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Travel Intentions Study
Wave 1 (November '03)

Presented To: Ontario Ministry Of
Tourism And Recreation

Ontario Tourism Marketing
Partnership

NFO CFgroup

January 2004

Background

- This study is intended to measure intent to travel to Ontario and specific Ontario destinations within key US and domestic markets.
- Information will be used to:
  - gauge the impact of negative events on travel to Ontario;
  - forecast demand to assist with industry planning;
  - provide information to assist with messaging and targeting of promotional communications and marketing initiatives more generally.

Background (Cont'd)

- This presentation focuses on findings in the following key areas:
  - the impact of SARS and other negative events on future travel to Ontario and Toronto;
  - quantifying recent Ontario travel behaviour;
  - measurement of Ontario and Toronto travel intentions within key markets with a particular emphasis on prioritizing regionally targeted marketing efforts;
  - Assessing impressions of Ontario and Toronto as travel destinations;
  - Understanding the trip planning process.

Methodology

- Interviewing was conducted by telephone among individuals 18 years or older.
- The survey was essentially confined to the month of November, 2003.
- The focus was on travel intentions for the coming season (Dec/Feb) and, secondarily the following seasons (March/May).
- A stringent methodology was used:
  - modified random digit dialing using a seed sample drawn from up-to-date telephone listings;
  - Multiple callbacks (8 calls to achieve a completion once contact is made with the household);
  - One additional callback to "soft" refusals.

Methodology (Cont'd)

- ✓ The Trodahl-Carder methodology was used to select a single age-eligible respondent to interview in each household.
- ✓ The sample was assigned disproportionately by market as follows:

	Assigned	Achieved
Canada:		
Toronto CMA	400	434
Ottawa CMA	200	249
Hamilton CMA	80	84
Ontario 100 – 499M	180	166
Ontario 30 – 99M	80	95
Ontario 10 – 29M	60	55
Ontario under 10M	100	114
Montreal CMA	300	280
Quebec City CMA	200	197
Winnipeg CMA	300	249

Methodology (Cont'd)

	Assigned	Achieved
United States:		
Rochester MSA	300	305
Buffalo — Niagara Falls MSA	300	293
Syracuse MSA	200	205
New York City PMSA	181	164
Nassau — Suffolk PMSA	43	30
Other NY State	87	55
Chicago PMSA	230	198
Other Illinois	70	70
Indianapolis MSA	90	81
Other Indiana	55	46
Boston NECMA	150	129
Mass. Ex-Boston	31	23

Methodology (Cont'd)

	Assigned	Achieved
United States: (Cont'd)		
Detroit PMSA	300	223
Northern Michigan PMSAs/MSAs	84	56
Other Michigan	64	60
Minneapolis—St. Paul UA	200	165
Other Minnesota	41	33
Cleveland—Lorain—Elyria PMSA	200	185
Cincinnati PMSA	100	89
Columbus MSA	104	81
Other Ohio	60	63
Pittsburgh MSA	300	242
Philadelphia PMSA	150	116
Other Pennsylvania	77	59
Milwaukee—Waukesha PMSA	200	175
Other Wisconsin	67	83
Washington DC PMSA	100	73
Maryland Ex. Washington DC	118	79

Methodology (Cont'd)

- In total, 5,304 interviews were completed:
  - 1,923 in Canada;
  - 3,381 in the United States.
- As part of data processing, the sample was weighted in three stages using the most recently available census information from each country:
  - household size within market;
  - household conversion weight (to correct for differential selection probabilities within household due to variations in number of age-qualified individuals within each);
  - age within gender within market.

Presentation Outline

- ✓ Experience With Ontario As A Travel Destination
- ✓ Impact Of Negative Events & SARS
- ✓ Travel Intentions
- ✓ Perceptions Of Ontario & Toronto As Travel Destinations
- ✓ The Trip Planning Process
- ✓ Summary And Implications

Experience With Ontario As A Travel Destination

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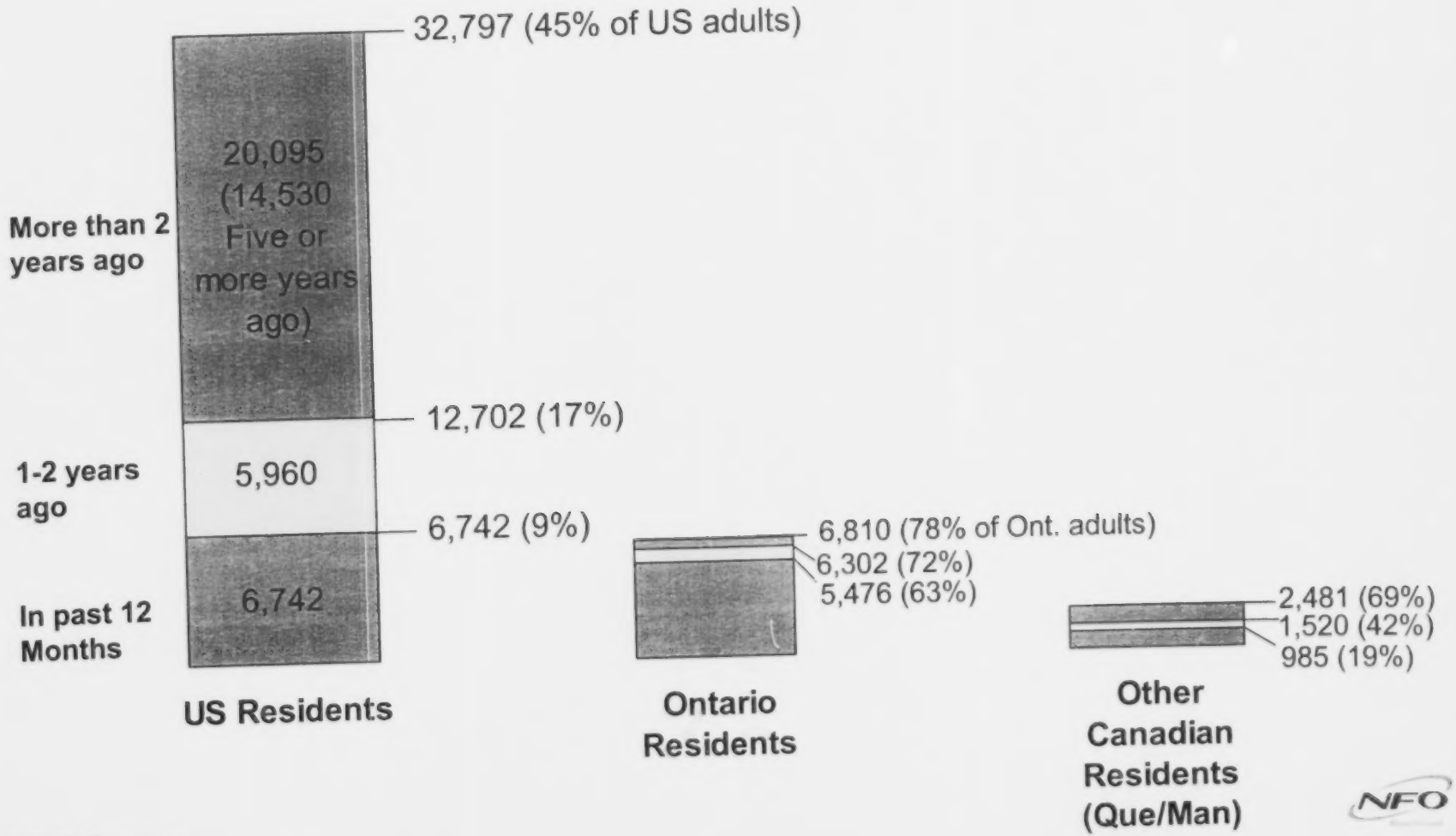
Last Trip To/Within Ontario

Number of adults in each region (thousands)



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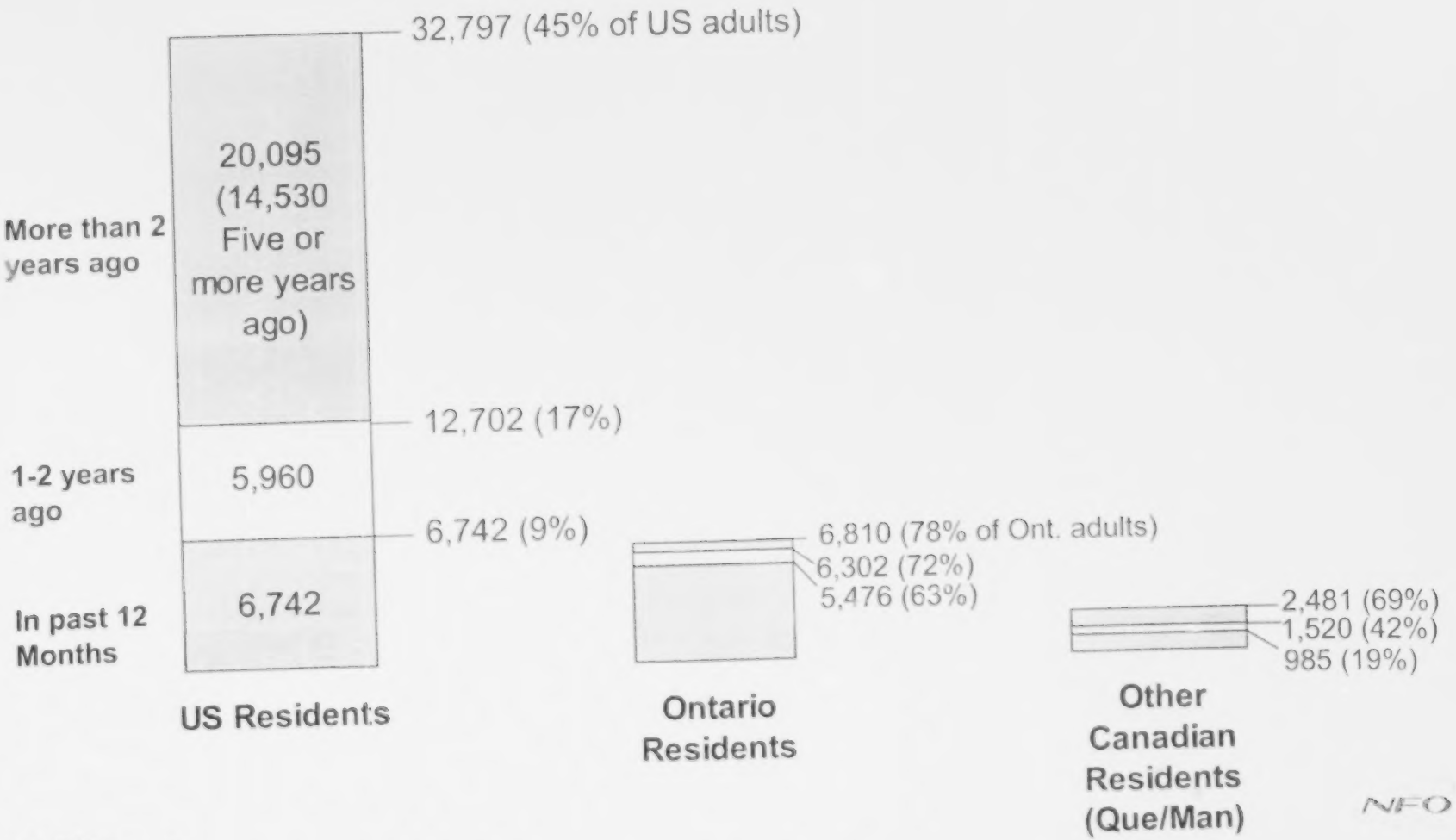
Last Trip To/Within Ontario

Number of adults in each region (thousands)



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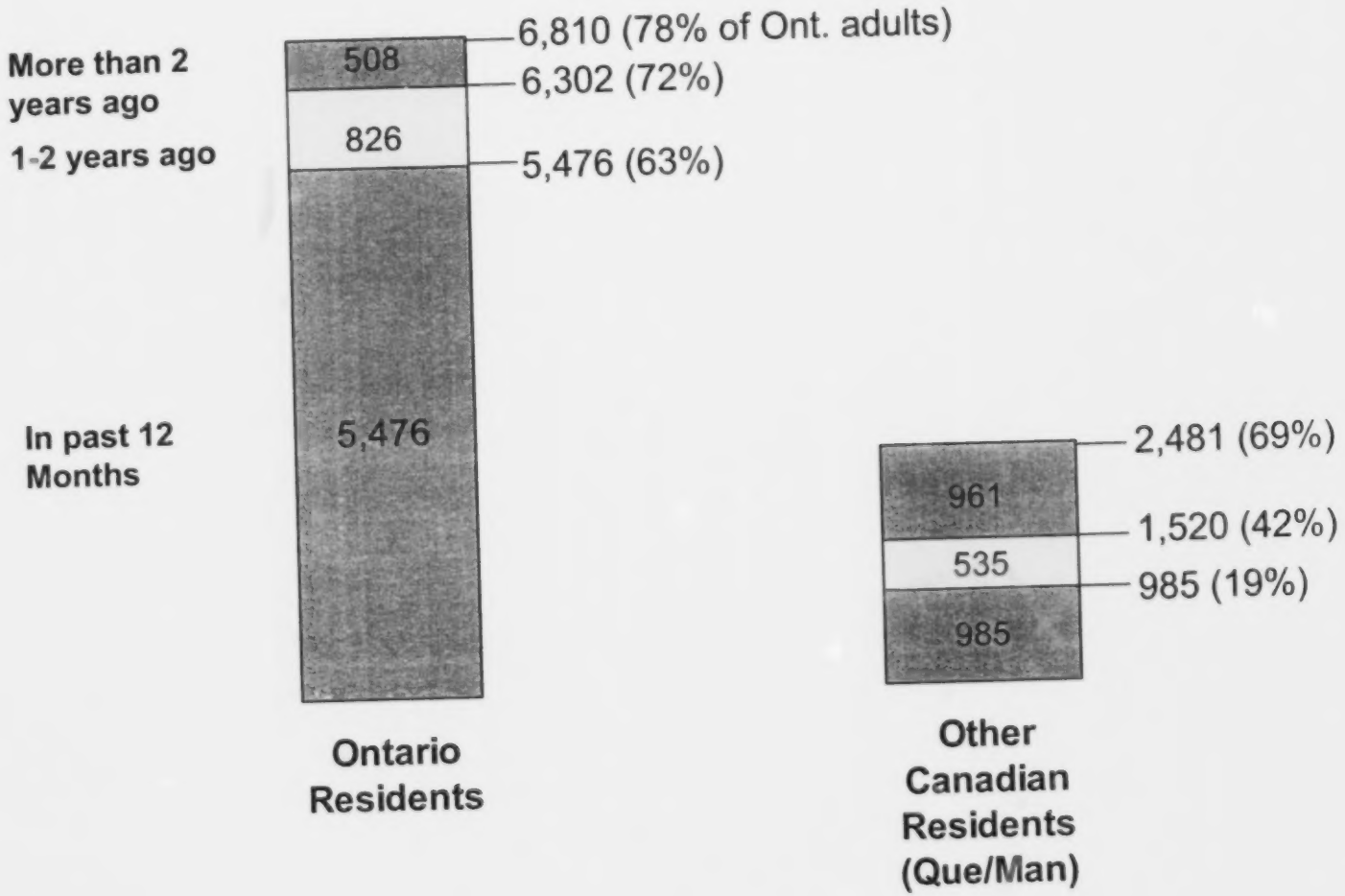
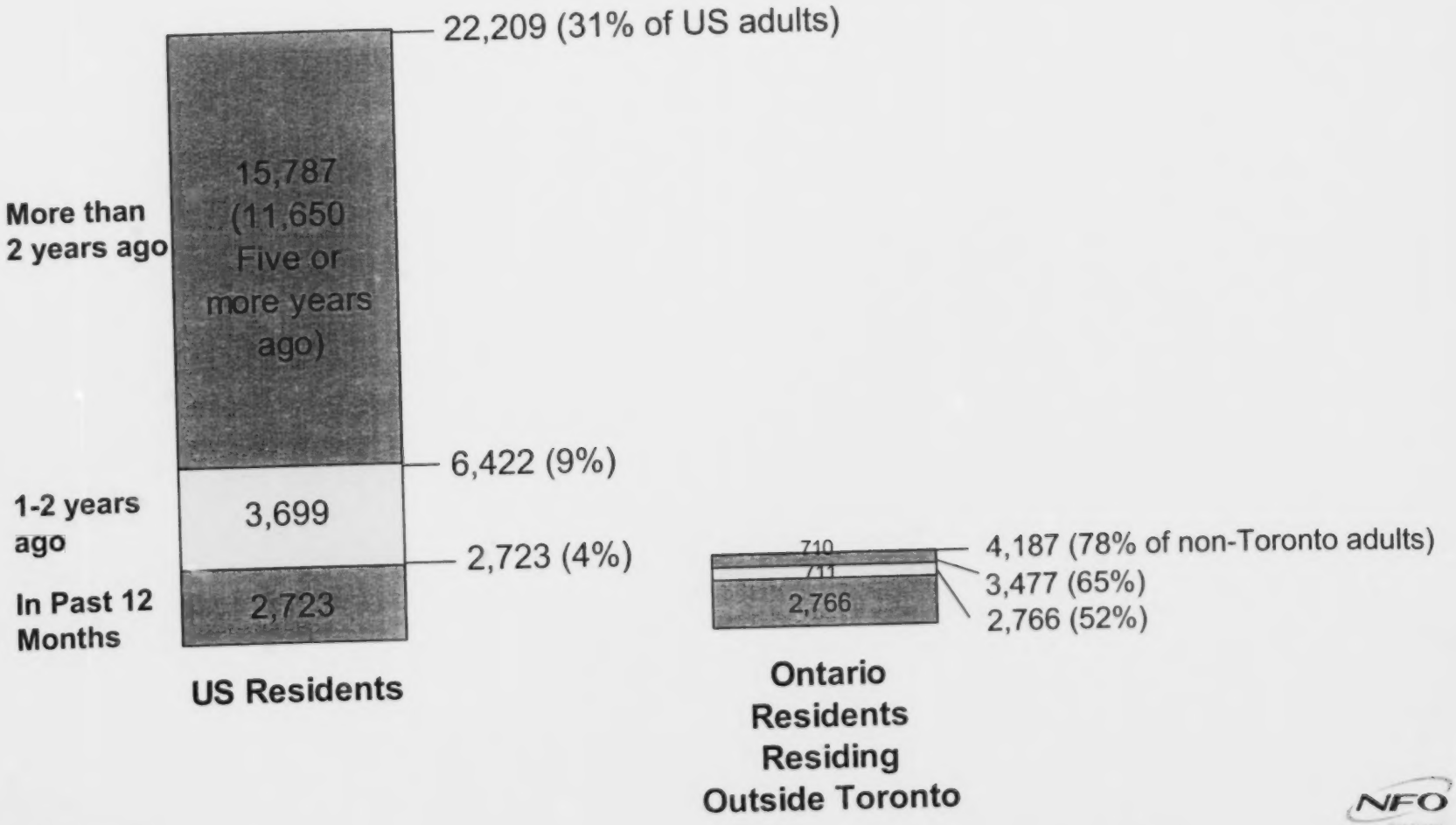
Last Trip To/Within Ontario

Number of adults in each region (thousands)



Last Trip To Toronto

Number of adults in each region (thousands)



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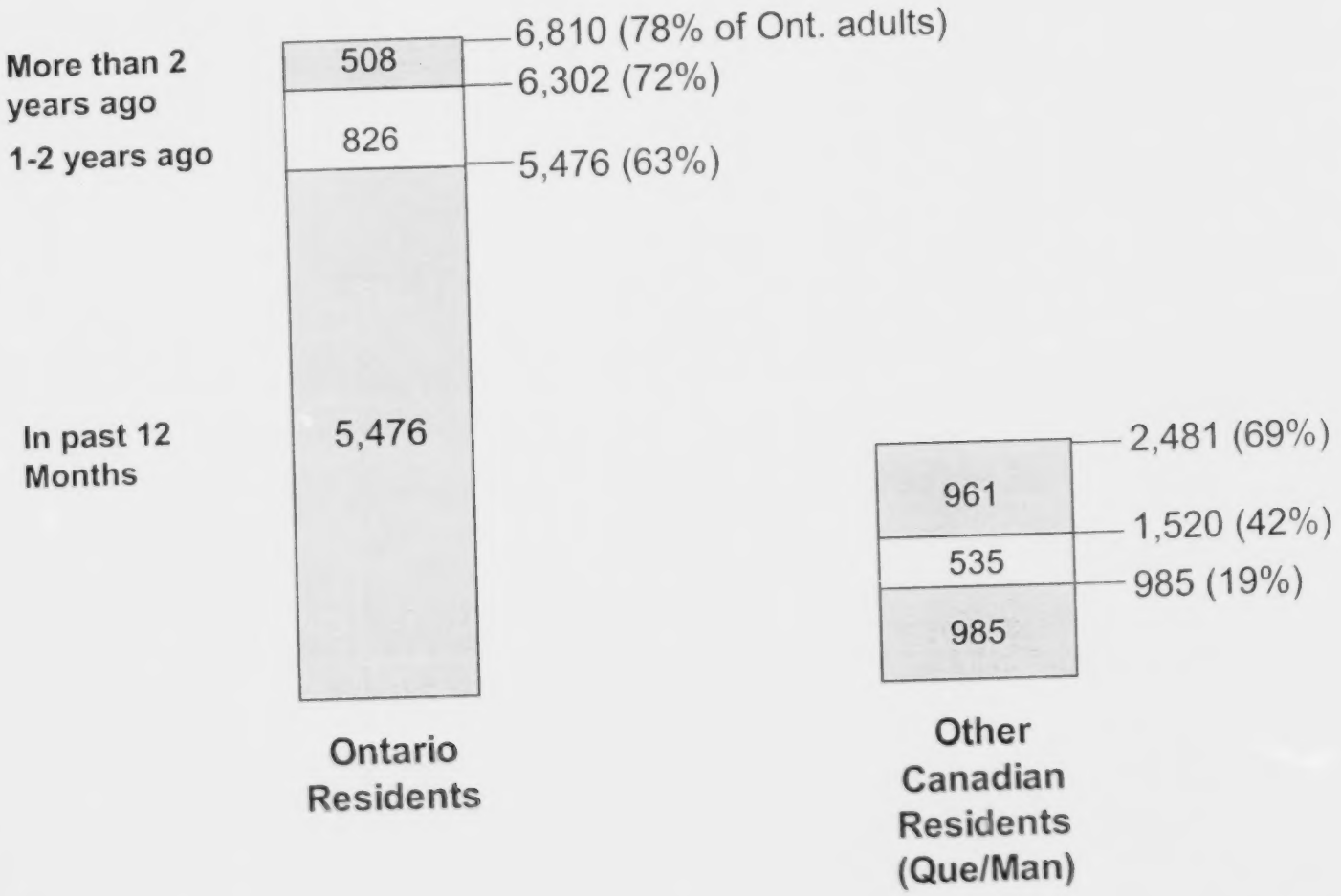
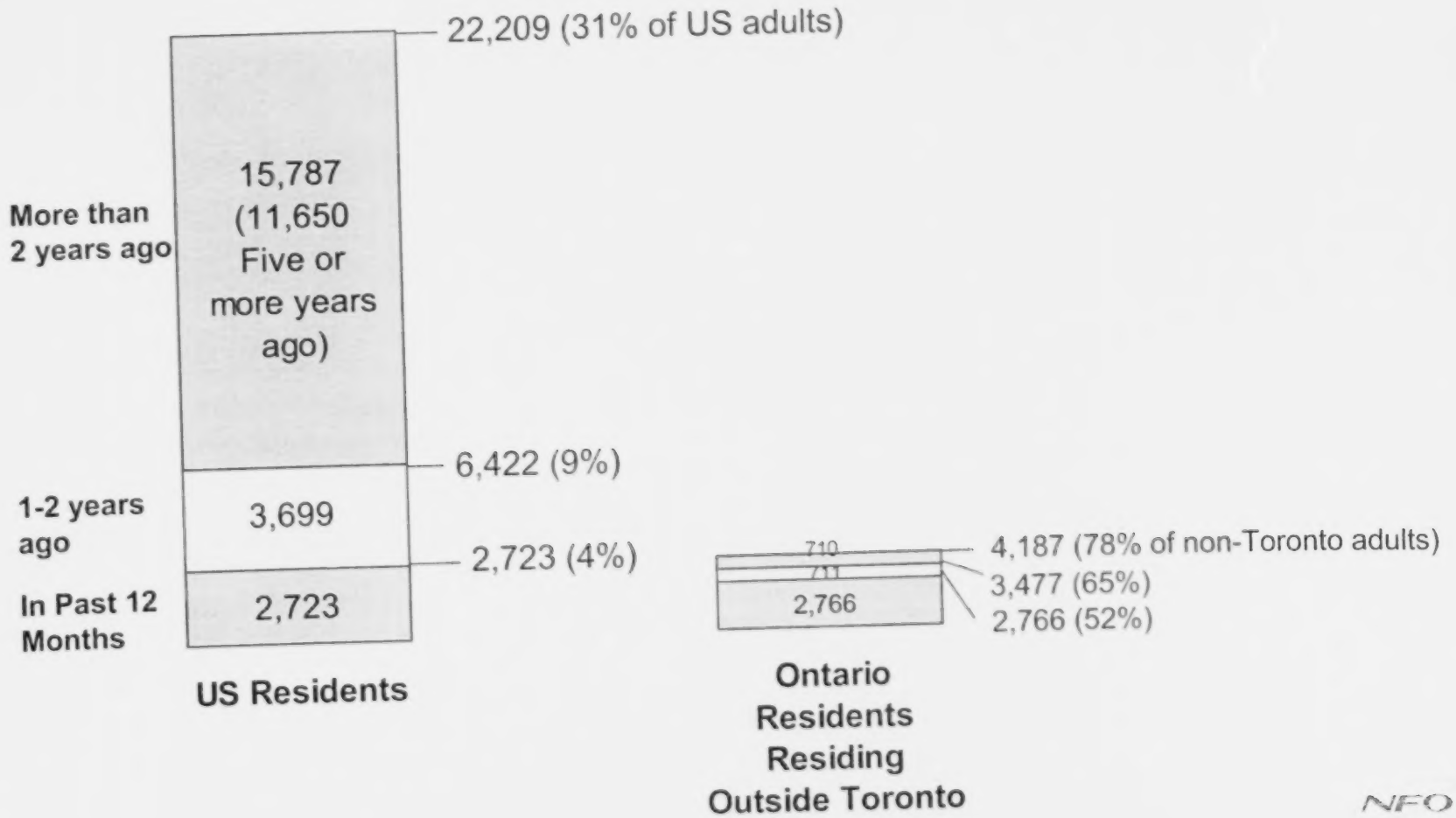
Last Trip To/Within Ontario

Number of adults in each region (thousands)



Last Trip To Toronto

Number of adults in each region (thousands)



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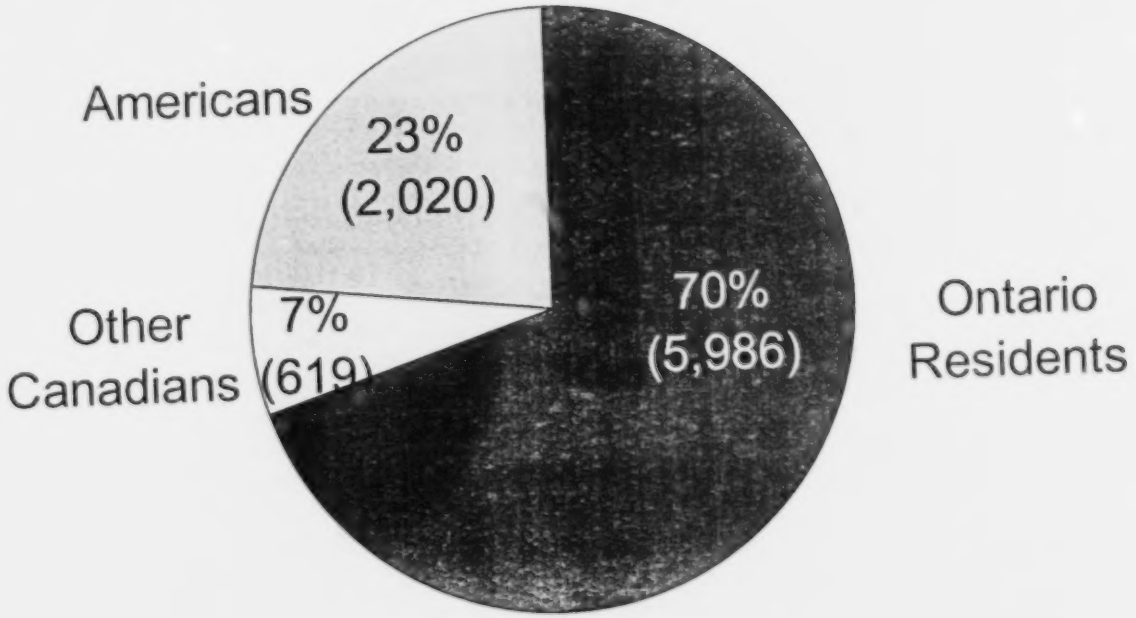
Most Recent Pleasure Trips Originate In Ontario

Percent (number) of Ontario trips in past 12 months



Most Recent Pleasure Trips Originate In Ontario

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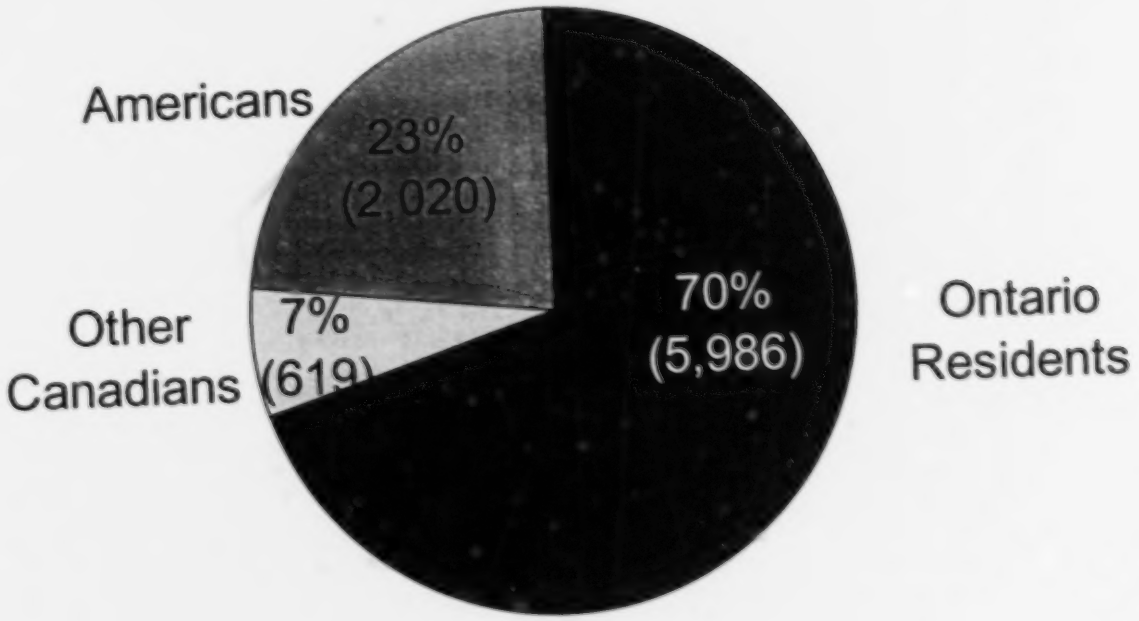

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Short Term Impacts Of Negative Events

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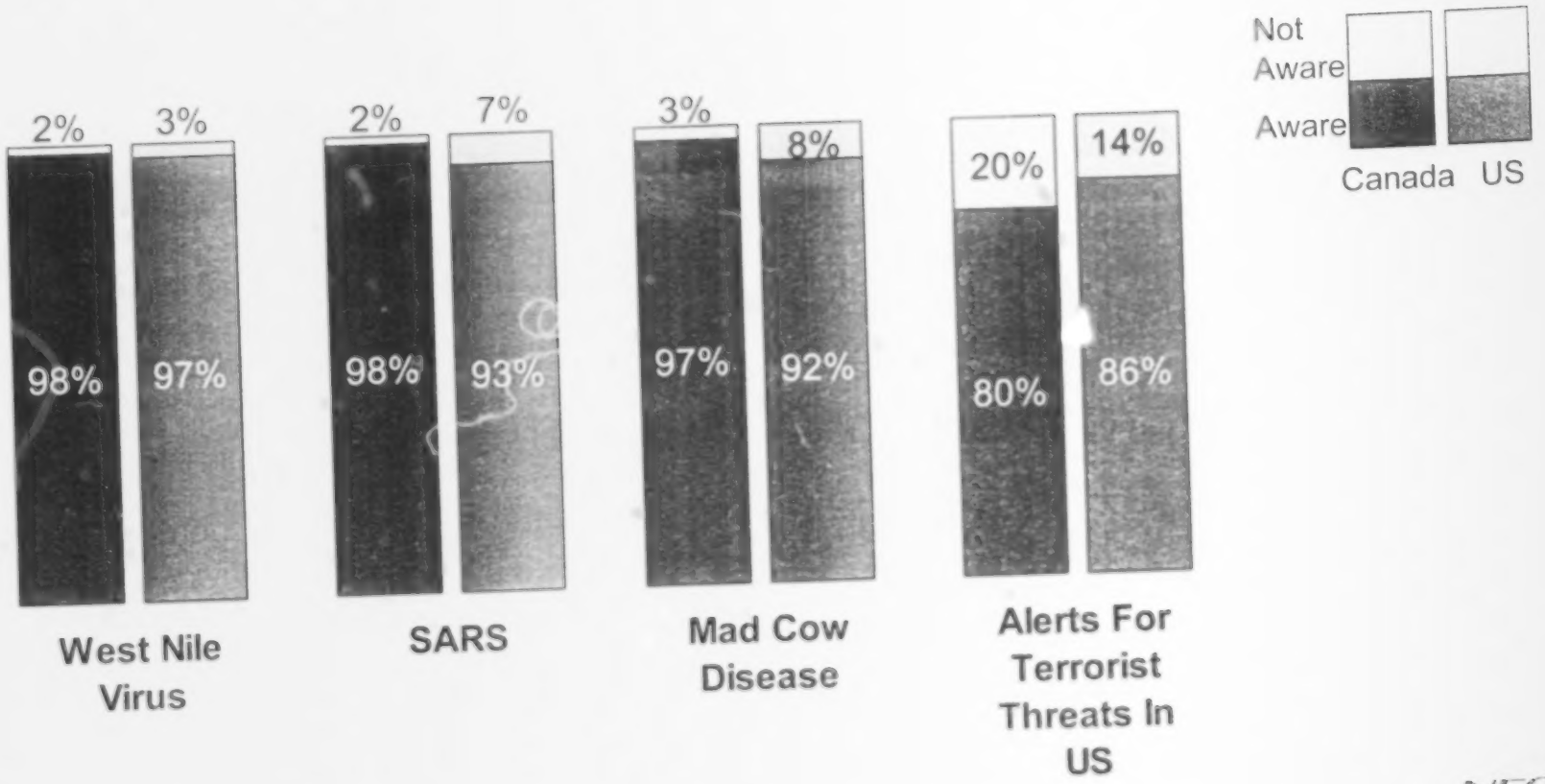
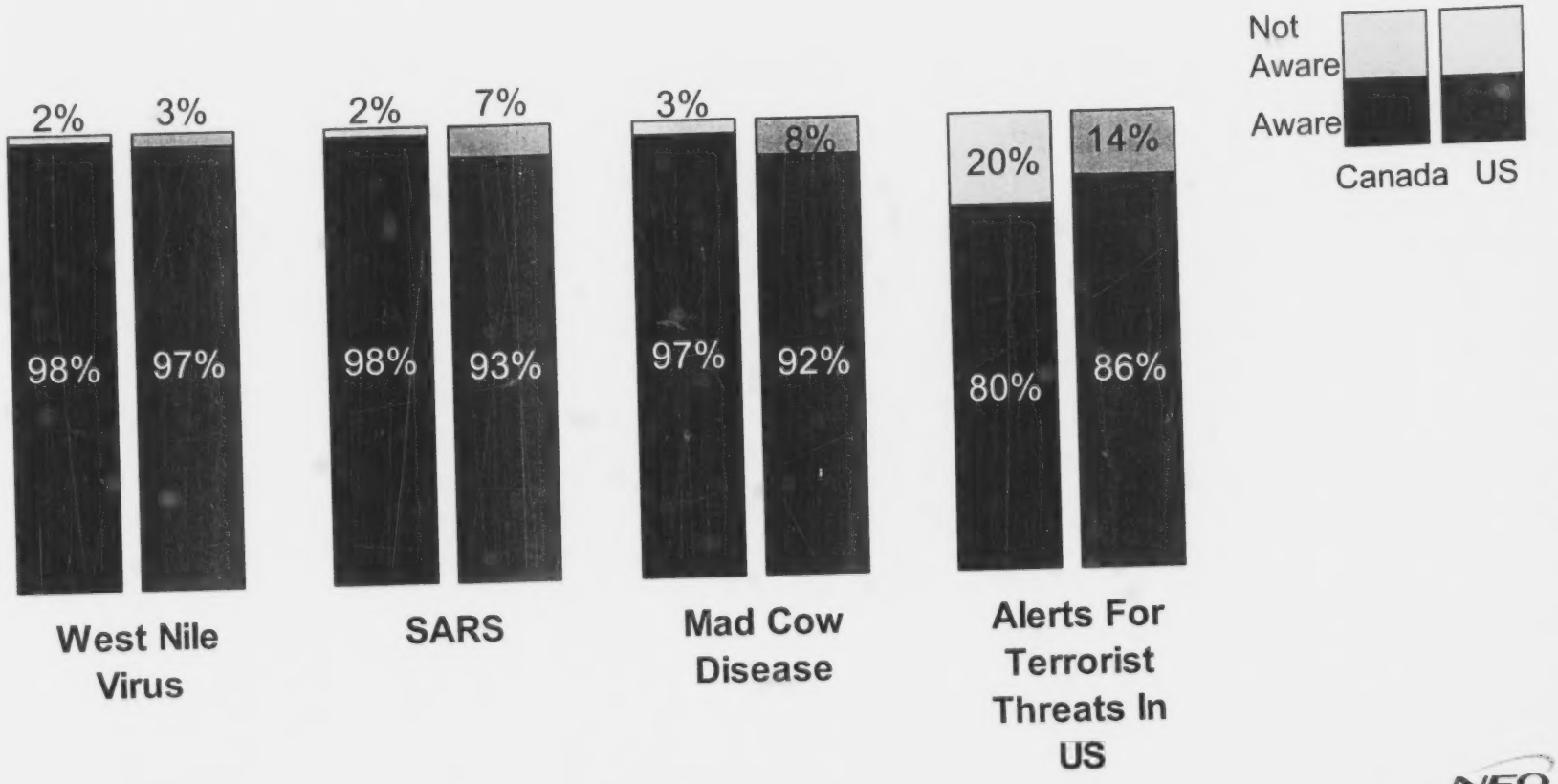
Awareness Of Negative Events

Percent of individuals 18+ years in each market



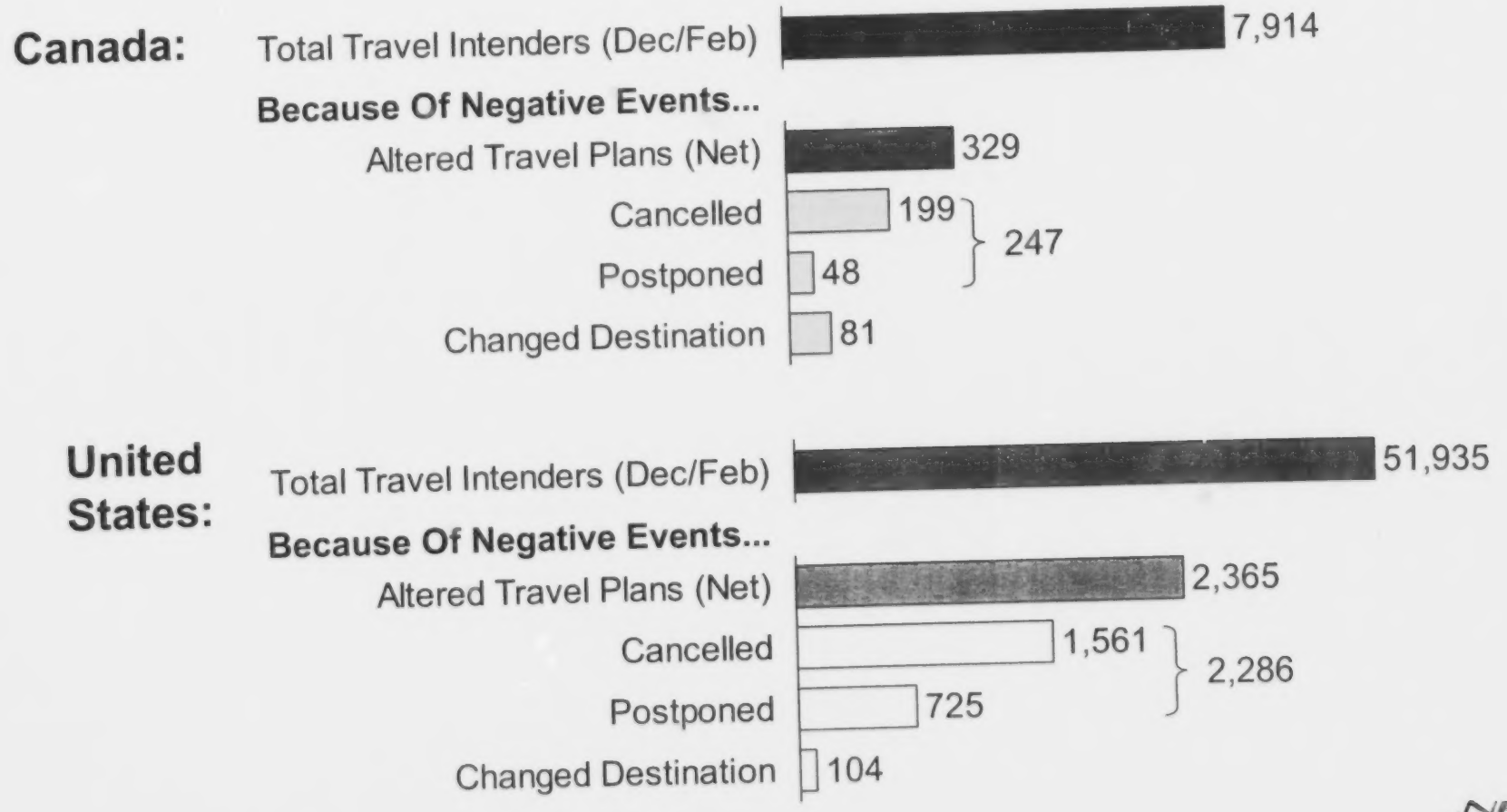
Awareness Of Negative Events

Percent of individuals 18+ years in each market



Impact Of Negative Events On Winter Travel Plans (Dec '03/Feb. '04)

Projected number of adults in each market (thousands)



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Impact Of Negative Events On Ontario Travel Next Season

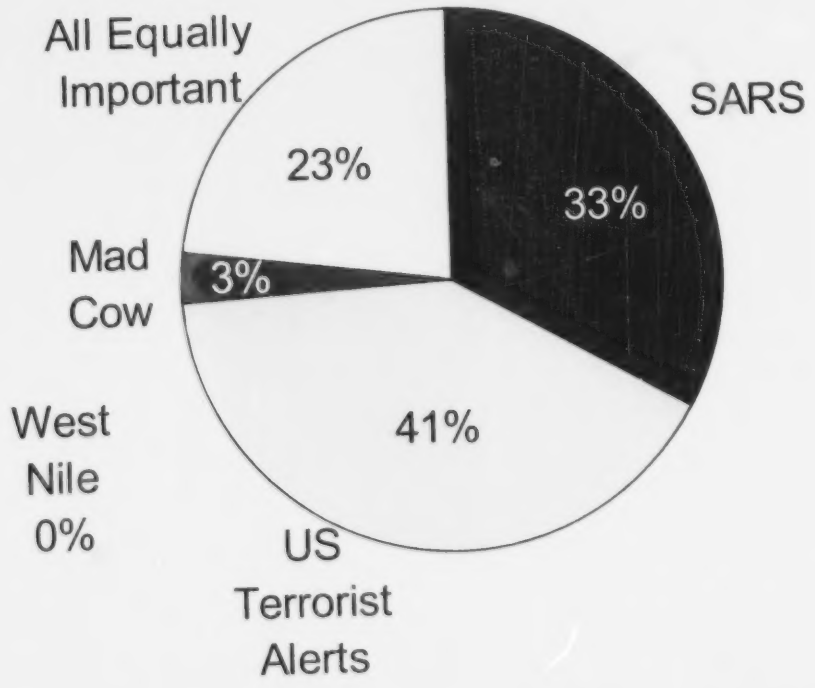
Projected number of adults in each case

	Travel Intention (Dec/Feb)	Travel Alteration Due To Negative Events (Dec/Feb)	RATIO Alteration/ Intention
Canadians:			
Any Travel	7,914	329	.042
Travel To Ontario	3,247	118	.036
Americans:			
Any Travel	51,935	2,365	.046
Travel To Ontario	4,573	642	.140

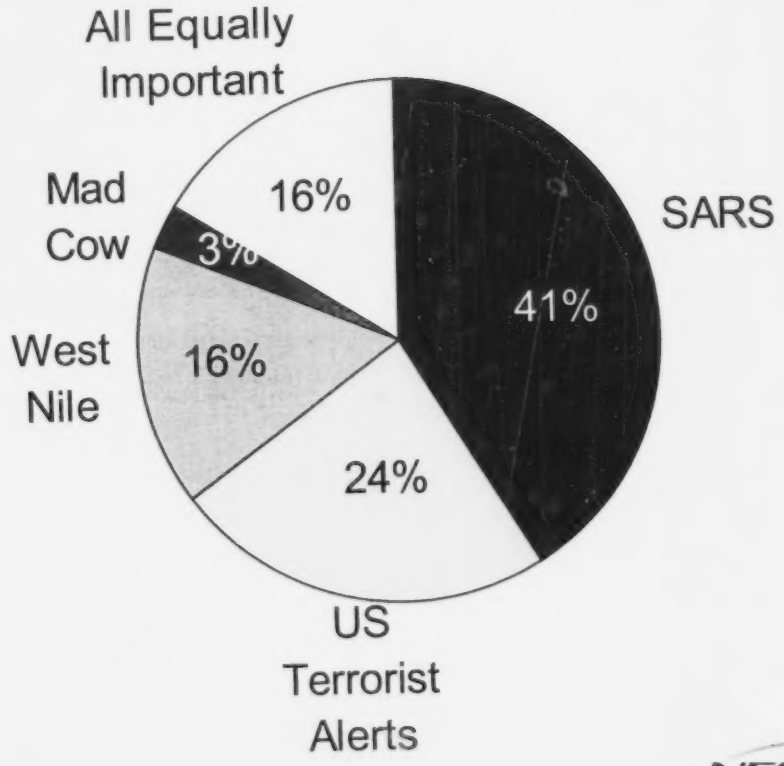
Most Important Event Affecting Next Season's Travel Plans

Percent of those claiming to have altered any travel plans*

Canadians



Americans



* Excluding "don't know".

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Longer Term Impacts

SARS

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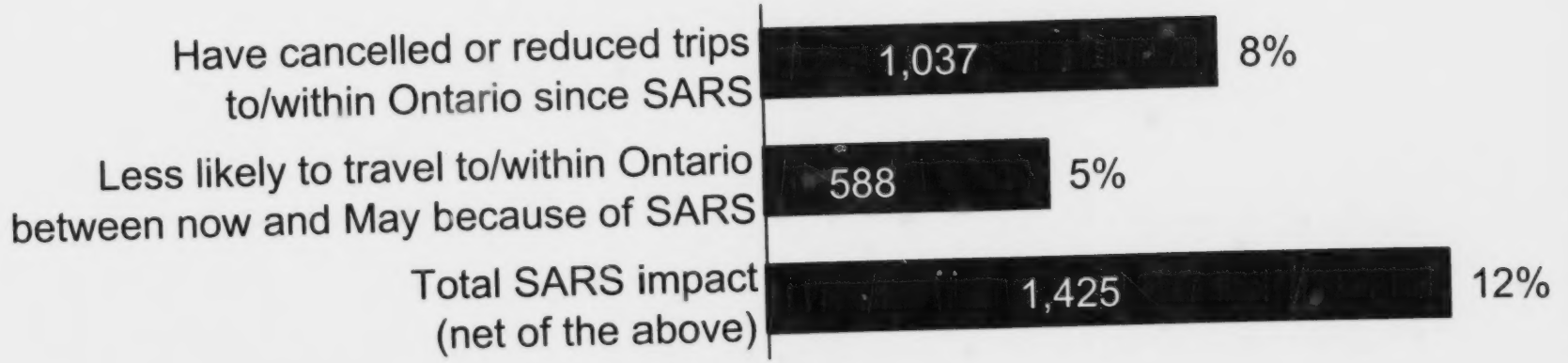
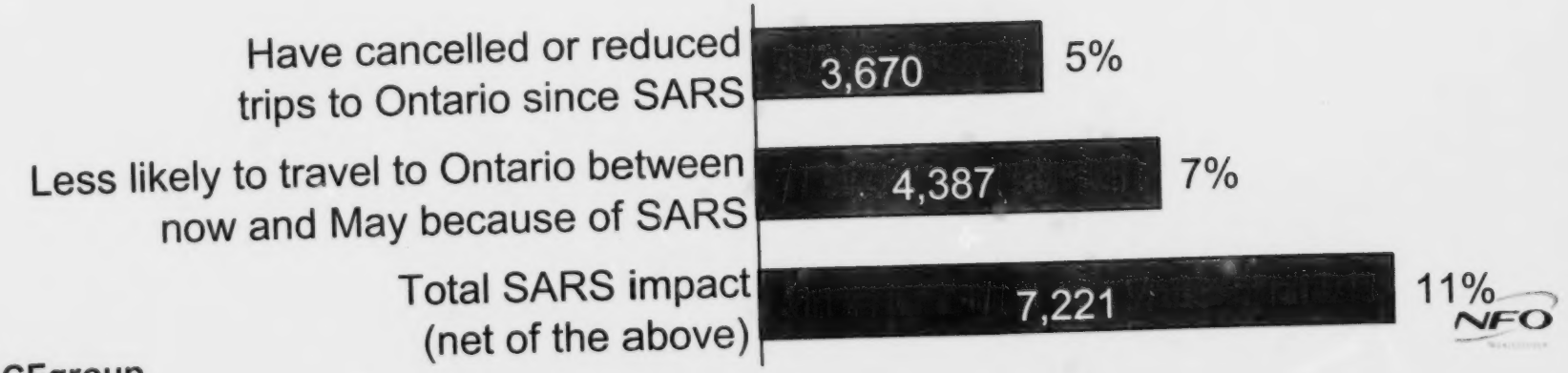
Total SARS Impact On Ontario

Project number (thousands)/percent of adults in each case

Canadians



Americans



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Canadian Geographic Variation In SARS Longer Term Impact On Toronto

		Percent Of Adult Residents In Each Case Stating... Because Of SARS		Recovery Index
		Have Cancelled Or Reduced Travel To Toronto	Less Likely To Travel To Toronto Between Now & May	– +
Quebec City	(197) %	9	8	+1
Montreal	(280) %	8	8	±0
Ottawa	(249) %	7	7	±0
Other Ontario	(514) %	8	3	+5
Winnipeg	(249) %	6	5	+1

Canadian Geographic Variation In SARS Longer Term Impact On Niagara Falls,Ontario

		Percent Of Adult Residents In Each Case Stating… Because Of SARS		
		Have Cancelled Or Reduced Travel To Niagara Falls	Less Likely To Travel To Niagara Falls Between Now & May	Recovery Index
Quebec City	(197) %	5	7	-2
Montreal	(280) %	3	8	-5
Toronto	(434) %	2	2	±0
Ottawa	(249) %	1	4	-3
Other Ontario	(514) %	3	2	+1
Winnipeg	(249) %	2	5	-3

US Geographic Variation In SARS Longer Term Impact On Toronto

		Percent Of Adult Residents In Each Case Stating... Because Of SARS		Recovery Index
		Have Cancelled Or Reduced Travel To Toronto	Less Likely To Travel To Toronto Between Now & May	– +
Buffalo	(293) %	20	6	+14
Rochester	(305) %	14	6	+8
Syracuse	(205) %	7	7	±0
New York City	(164) %	7	9	-2
Pittsburgh	(242) %	7	6	+1
Detroit	(223) %	5	10	-5
Cleveland	(185) %	4	8	-4
Boston	(129) %	5	6	-1
Columbus	(81) %	1	1	±0
Washington DC	(73) %	4	4	±0
Cincinnati	(89) %	2	2	±0
Milwaukee	(175) %	3	8	-5
Indianapolis	(81) %	2	4	-2
Chicago	(198) %	2	5	-3
Philadelphia	(116) %	2	10	-8
Minneapolis	(165) %	*	2	-2

*Less than 0.5%.

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US Geographic Variation In SARS
Longer Term Impact On Niagara Falls, Ontario

		Percent Of Adult Residents In Each Case Stating... Because Of SARS		
		Have Cancelled Or Reduced Travel To Niagara Falls	Less Likely To Travel To Niagara Falls Between Now & May	Recovery Index
Buffalo	(293) %	8	5	+3
Rochester	(305) %	6	5	+1
Syracuse	(205) %	6	6	±0
New York City	(164) %	5	6	-1
Pittsburgh	(242) %	5	6	-1
Detroit	(223) %	4	6	-2
Cleveland	(185) %	4	6	-2
Boston	(129) %	3	4	-1
Columbus	(81) %	2	1	+1
Washington DC	(73) %	3	5	-2
Cincinnati	(89) %	2	2	±0
Milwaukee	(175) %	2	7	-5
Indianapolis	(81) %	–	3	-3
Chicago	(198) %	1	3	-2
Philadelphia	(116) %	1	8	-7
Minneapolis	(165) %	–	1	-1

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Travel Intentions

Winter And Spring Seasons

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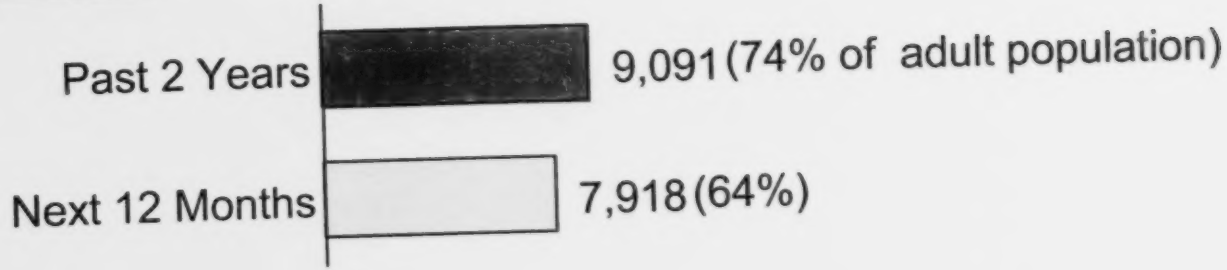
The Pool Of Potential Travellers — Past & Intended

Number of adults taking overnight trip (thousands)

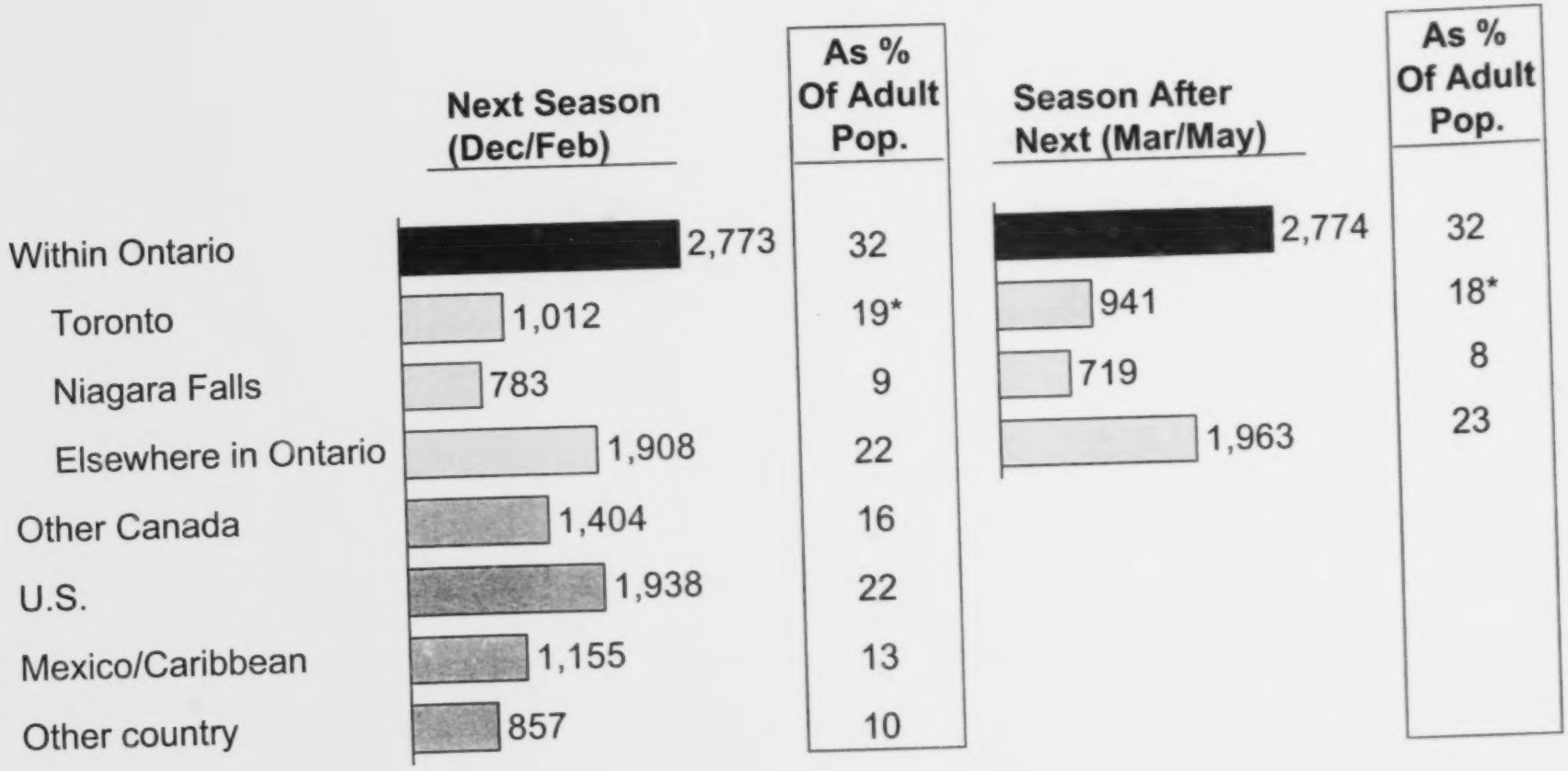
Canadians



Americans

Intended Travel Patterns Of Ontario Residents

Number of adults claiming overnight trip (thousands)



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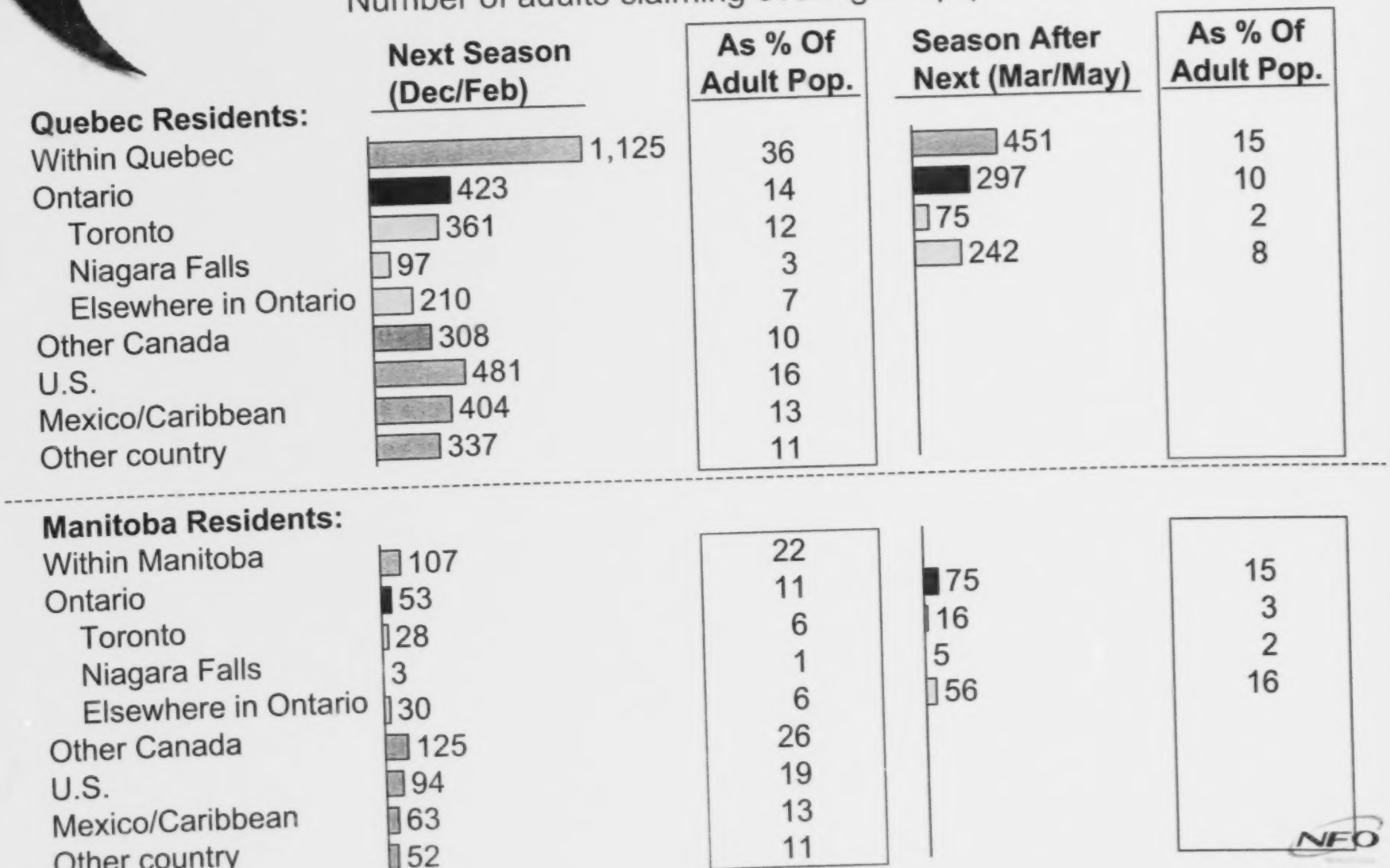
* Among Toronto non-residents

Intended Travel Patterns Of Quebec & Manitoba Residents

Number of adults claiming overnight trip (thousands)


Next Season (Dec/Feb)
As % Of Adult Pop.
Season After Next (Mar/May)
As % Of Adult Pop.
Quebec Residents:
Within Quebec 1,125 36 451 15
Ontario 423 14 297 10
Toronto 361 12 75 2
Niagara Falls 97 3 242 8
Elsewhere in Ontario 210 7
Other Canada 308 10
U.S. 481 16
Mexico/Caribbean 404 13
Other country 337 11
Manitoba Residents:
Within Manitoba 107 22 15
Ontario 53 11 75 3
Toronto 28 6 16 2
Niagara Falls 3 1 5
Elsewhere in Ontario 30 6 56 16
Other Canada 125 26
U.S. 94 19
Mexico/Caribbean 63 13
Other country 52 11
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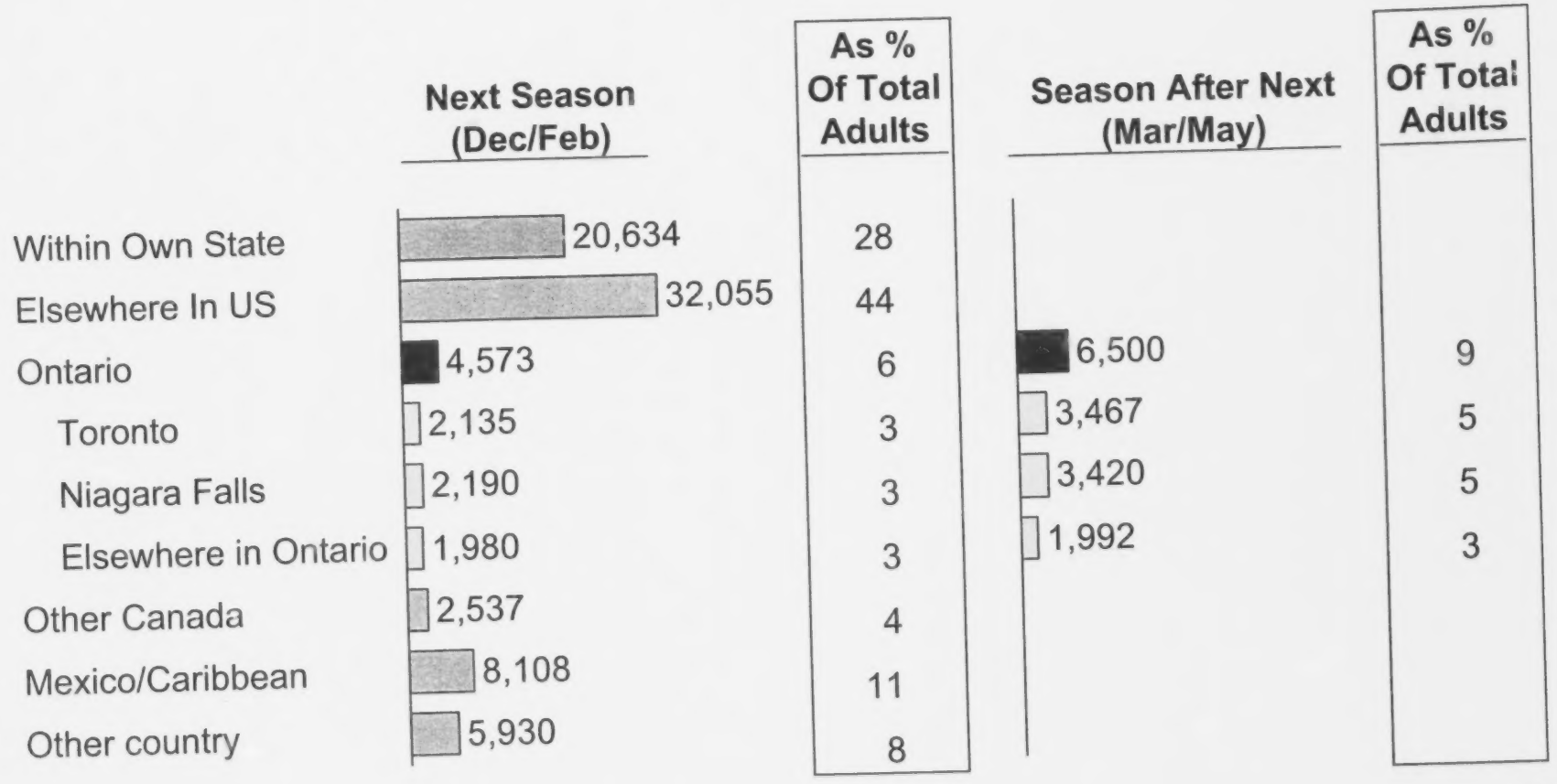
Intended Travel Patterns Of US Residents

Number of adults taking overnight trip (thousands)



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Origin Of Intended Trips To Toronto

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Toronto Travel Intention Incidence By Canadian Market

		Percent Of Adults In Each Case Stating...				
		Intend To Travel To Toronto			SARS Will Likely Reduce Toronto Travel Dec/May	
		Dec/Feb	Mar/May	Net Dec/May		
Quebec City	(197) %	8	7	10	8	0.80
Montreal	(280) %	13	10	15	8	0.53
Ottawa	(249) %	23	20	31	7	0.23
Other Ontario	(514) %	18	17	26	3	0.12
Winnipeg	(249) %	6	3	7	5	0.71
TOTAL CANADA (ex. Toronto)	**(1,489) %**	**14**	**14**	**21**	**5**	**0.24**

SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

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Toronto Travel Intention Incidence By US Market

		Percent Of Adults In Each Case Stating				
		Intend To Travel To Toronto			SARS Will Likely Reduce Toronto Travel Dec/May	
		Dec/Feb	Mar/May	Net Dec/May		
Buffalo	(293) %	14	15	23	6	0.26
Rochester	(305) %	14	13	20	6	0.30
Syracuse	(205) %	4	7	8	7	0.88
New York City	(164) %	2	7	8	9	1.13
Pittsburgh	(242) %	5	9	12	6	0.50
Detroit	(223) %	7	11	15	10	0.67
Cleveland	(185) %	3	7	10	8	0.80
Boston	(129) %	2	5	7	6	0.86
Columbus	(81) %	4	5	7	1	0.14
Washington DC	(73) %	–	4	5	4	0.80
Cincinnati	(89) %	–	2	2	2	1.00
Milwaukee	(175) %	3	5	5	8	1.60
Indianapolis	(81) %	–	2	2	4	2.00
Chicago	(198) %	3	4	4	5	1.25
Philadelphia	(116) %	3	5	7	10	1.43
Minneapolis	(165) %	–	1	1	2	2.00
TOTAL US	**(3,381) %**	**3**	**5**	**6**	**6**	**1.00**

SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

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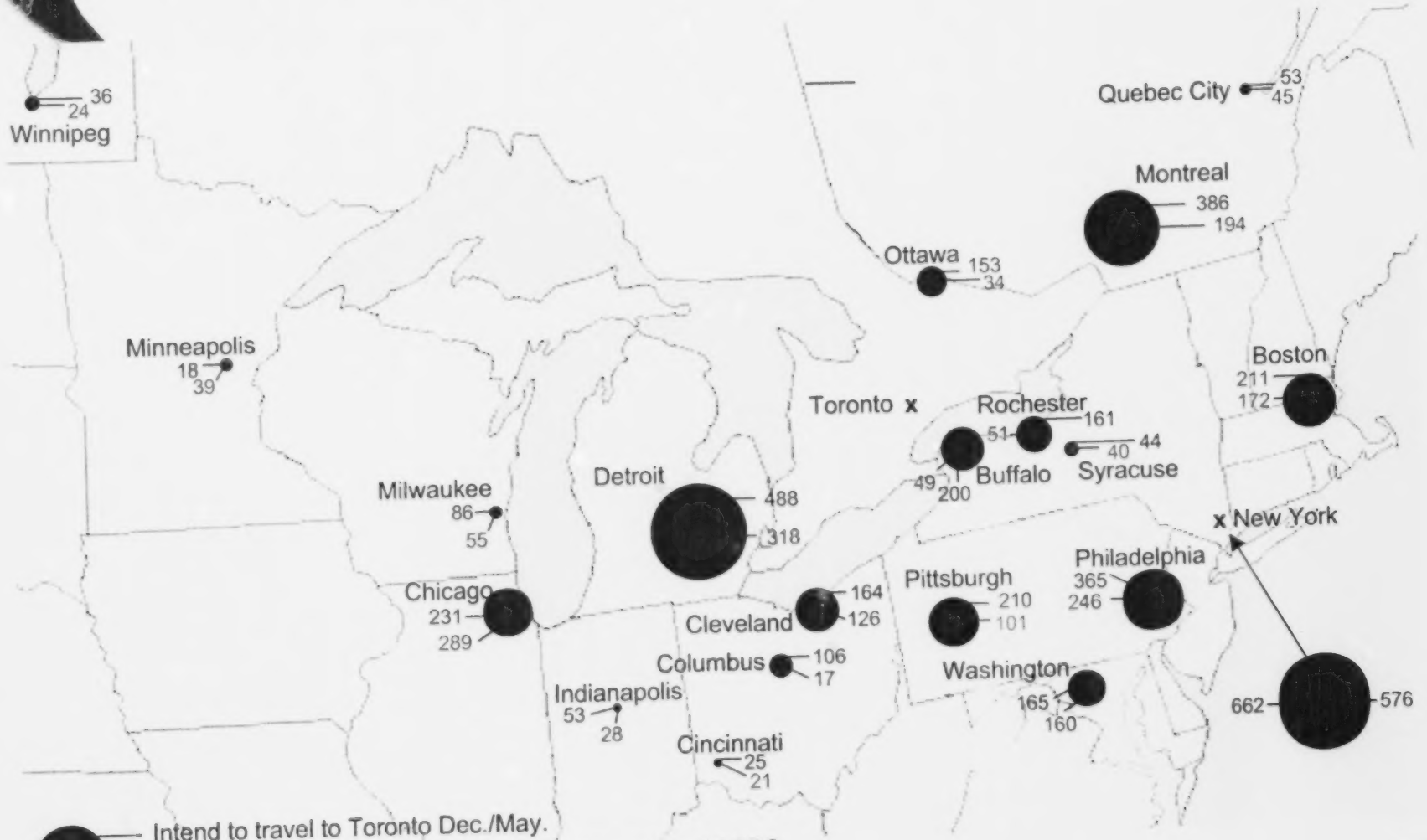
Toronto Travel Intention Volume - Dec./May (Thousands)



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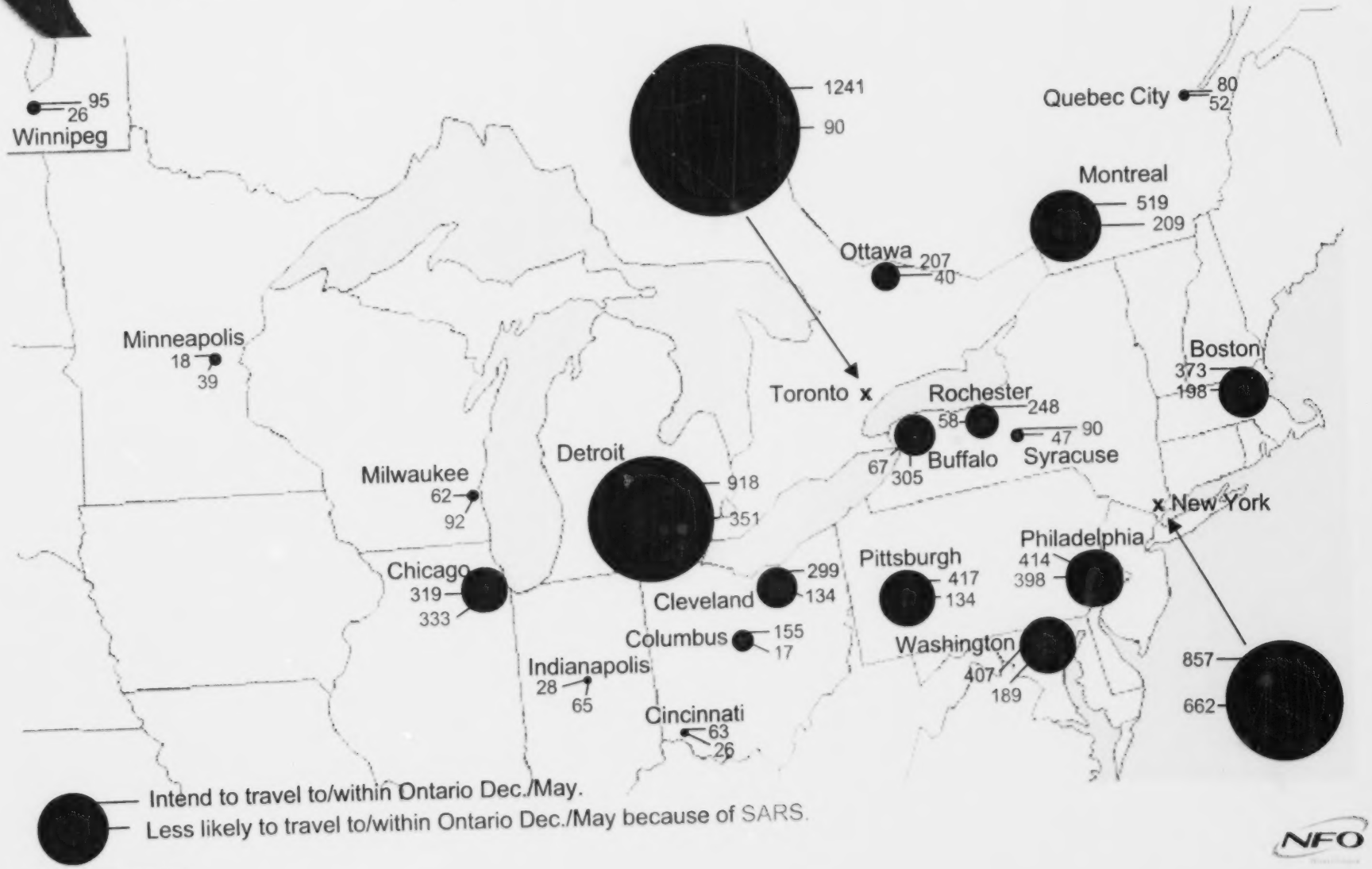
Ontario Travel Intention Volume - Dec./May (Thousands)



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Travel Intentions

- Origin Of Intended Trips To Niagara Falls

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Niagara Falls Travel Intention Incidence By Canadian Market

		Percent Of Adults In Each Case Stating…					
		Intend To Travel To Niagara Falls			SARS Will Likely Reduce Niagara Falls Travel Dec/May		
		Dec/Feb	Mar/May	Net Dec/May			
Quebec City	(197) %	2	1	2	7	3.50	⬅
Montreal	(280) %	3	3	4	8	2.00	⬅
Toronto	(434) %	13	11	19	2	0.11	
Ottawa	(249) %	5	3	6	4	0.67	
Other Ontario	(514) %	6	7	10	2	0.20	
Winnipeg	(249) %	1	1	2	5	2.50	⬅
TOTAL CANADA	**(1,923) %**	**7**	**7**	**11**	**4**	**0.36**	

SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

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Niagara Falls Travel Intention Incidence By US Market

		Percent Of Adults In Each Case Stating				
		Intend To Travel To Niagara Falls			SARS Will Likely Reduce Niagara Falls Travel Dec/May	
		Dec/Feb	Mar/May	Net Dec/May		
Buffalo	(293) %	18	15	25	5	0.20
Rochester	(305) %	15	13	21	5	0.24
Syracuse	(205) %	7	8	12	6	0.50
New York City	(164) %	2	5	6	6	1.00
Pittsburgh	(242) %	5	14	17	6	0.35
Detroit	(223) %	4	8	11	6	0.55
Cleveland	(185) %	4	11	12	6	0.50
Boston	(129) %	–	4	5	4	0.80
Columbus	(81) %	–	2	2	1	0.50
Washington DC	(73) %	2	4	6	5	0.83
Cincinnati	(89) %	2	–	2	2	1.00
Milwaukee	(175) %	1	2	2	7	3.50
Indianapolis	(81) %	–	–	–	3	∝
Chicago	(198) %	1	2	2	3	1.50
Philadelphia	(116) %	4	5	8	8	1.00
Minneapolis	(165) %	–	–	–	1	∝
TOTAL US	**(3,381) %**	**3**	**5**	**6**	**5**	**0.83**

SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

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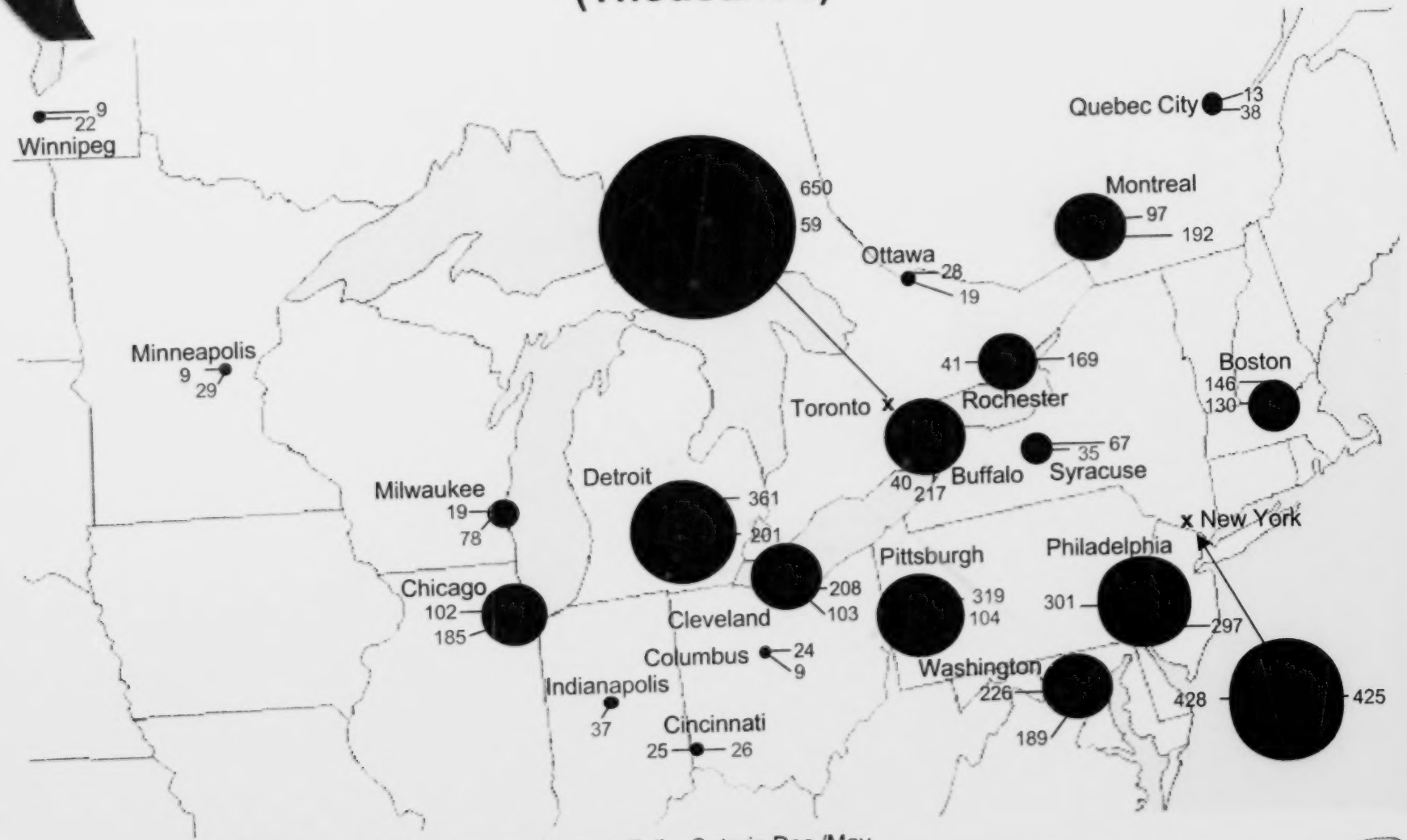
Niagara Falls Travel Intention Volume - Dec./May (Thousands)



Intend to travel to Niagara Falls, Ontario Dec./May.

Less likely to travel to Niagara Falls, Ontario Dec./May because of SARS.

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The Nature Of Intended Pleasure And Business Travel To Ontario

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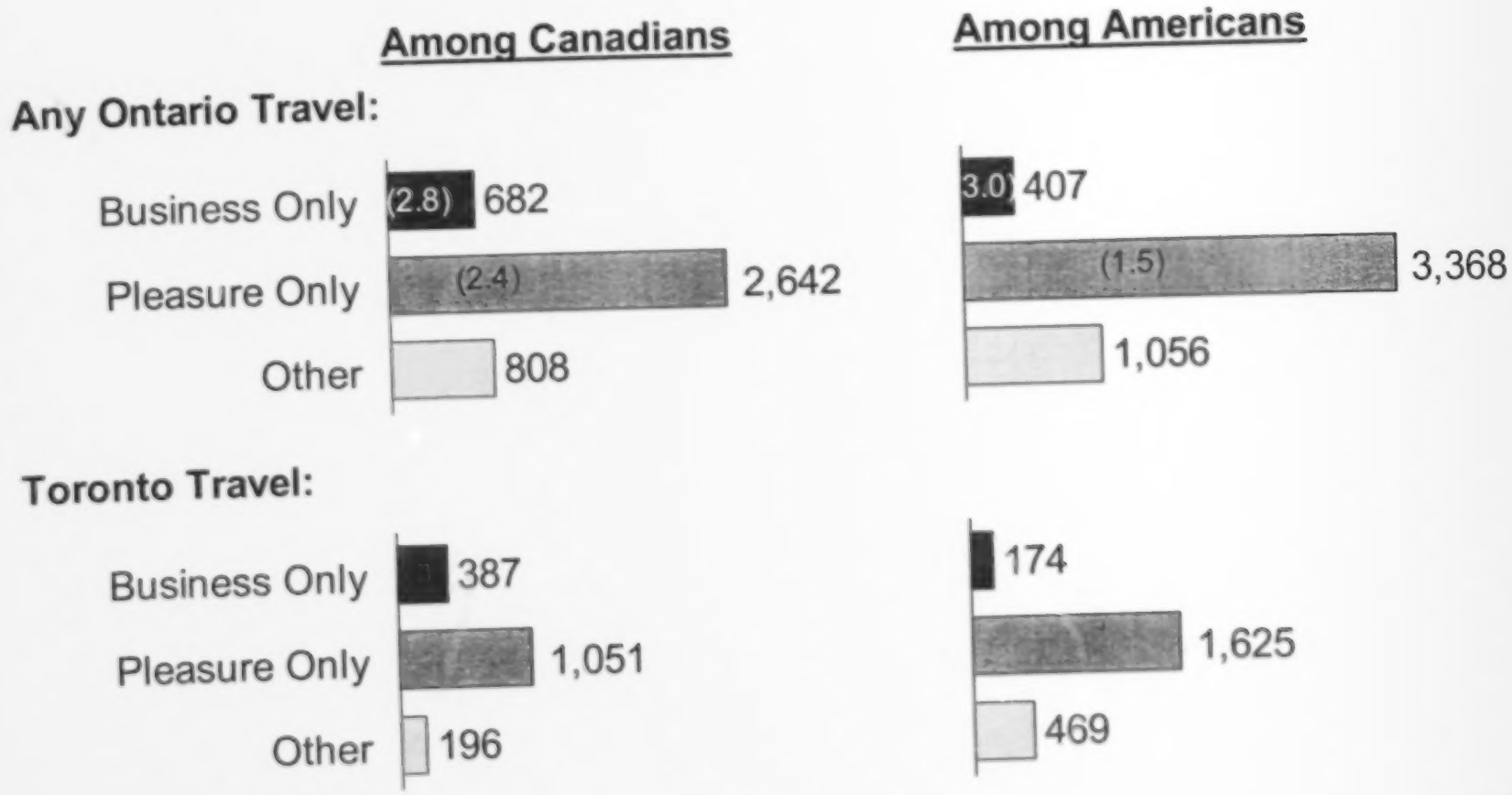
Main Purpose For Overnight Trips To Ontario Next Season (Dec/Feb)

Number of travellers (thousands)



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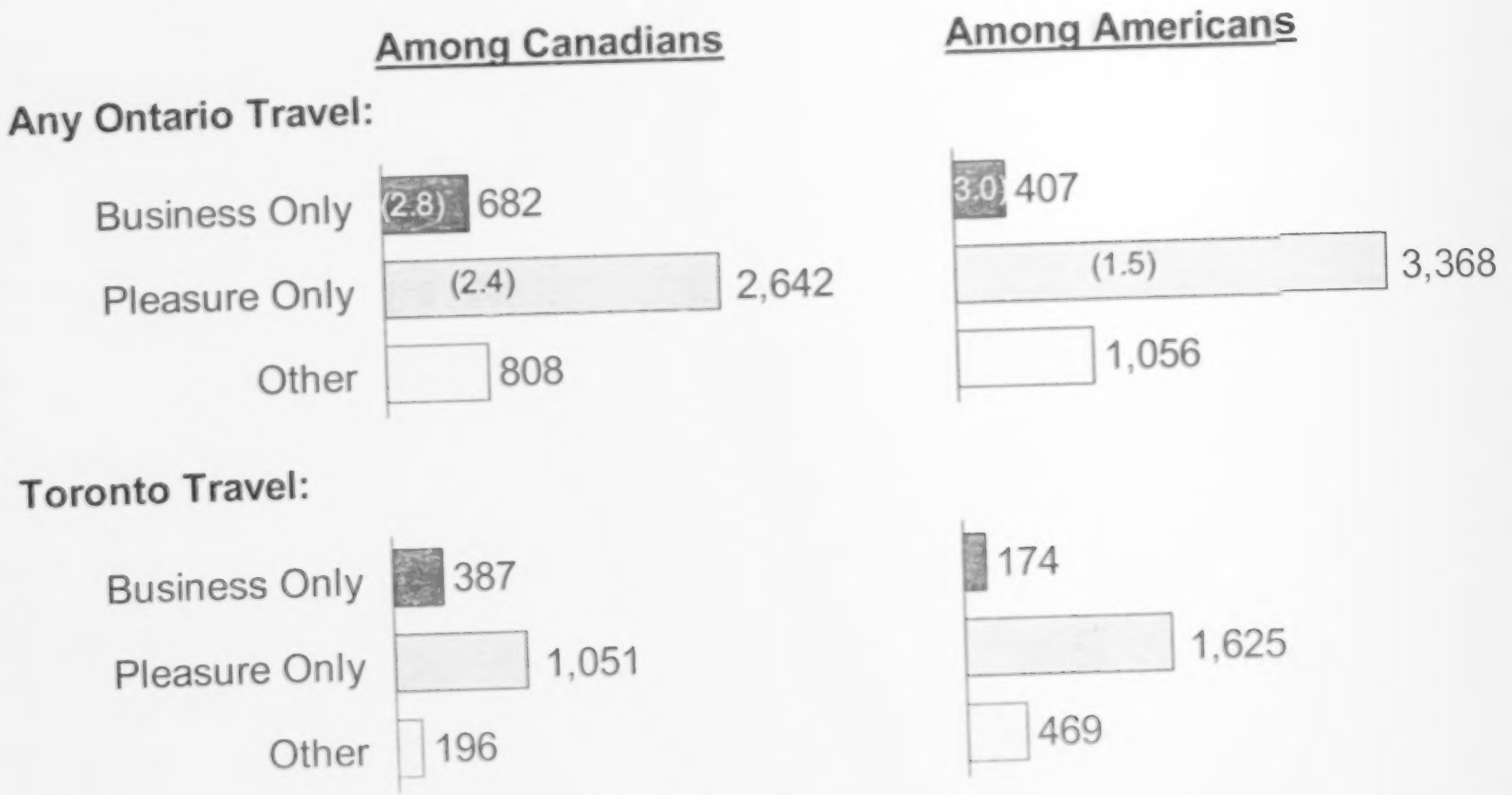
NFO CFgroup ( ) = Avg. trips per business/pleasure travellers

Main Purpose For Overnight Trips To Ontario Next Season (Dec/Feb)

Number of travellers (thousands)



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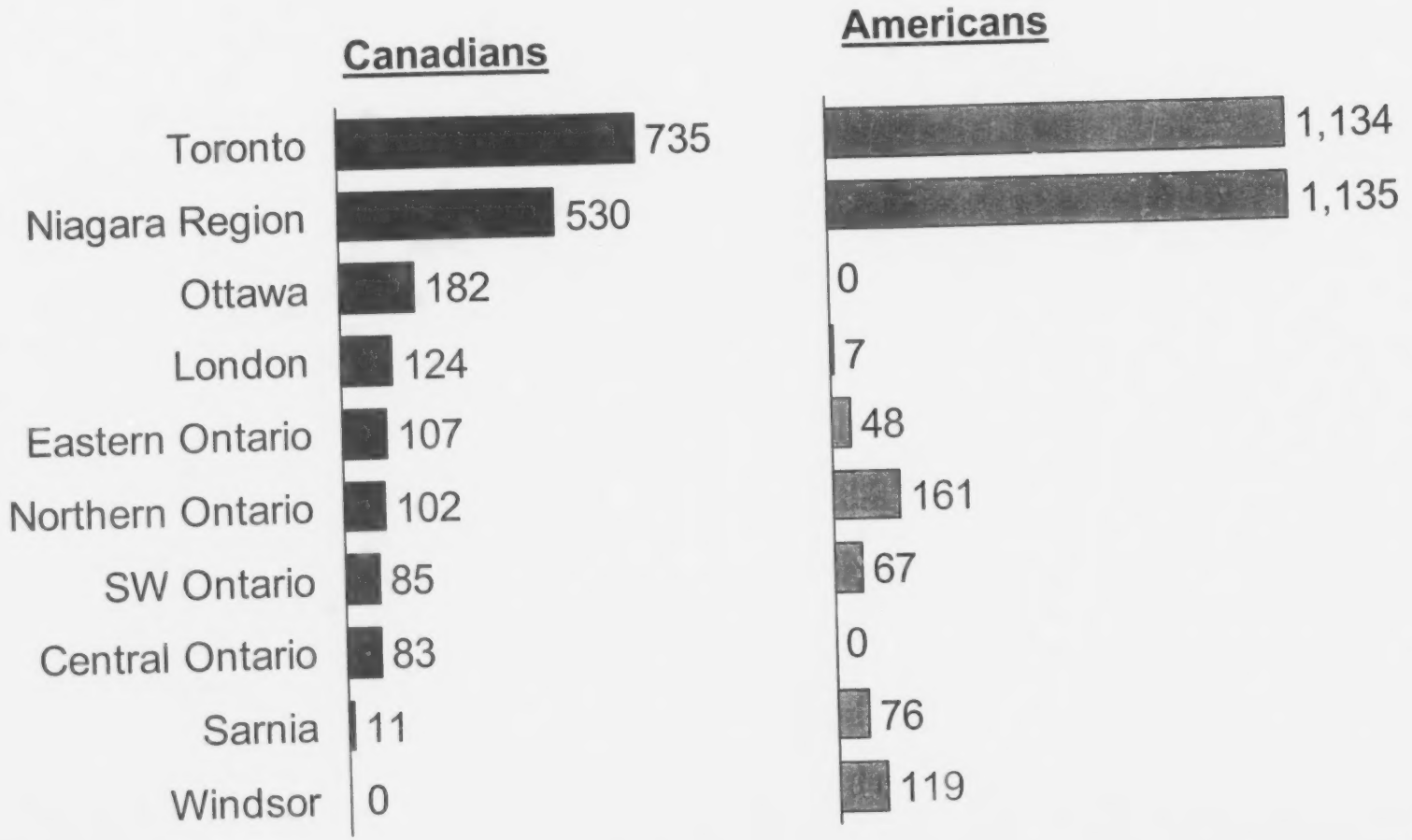
NFO CFgroup ( ) = Avg. trips per business/pleasure travellers

Destination Of Next Overnight Pleasure Trip To/Within Ontario

Number of individuals who intend to travel to each destination (thousands)



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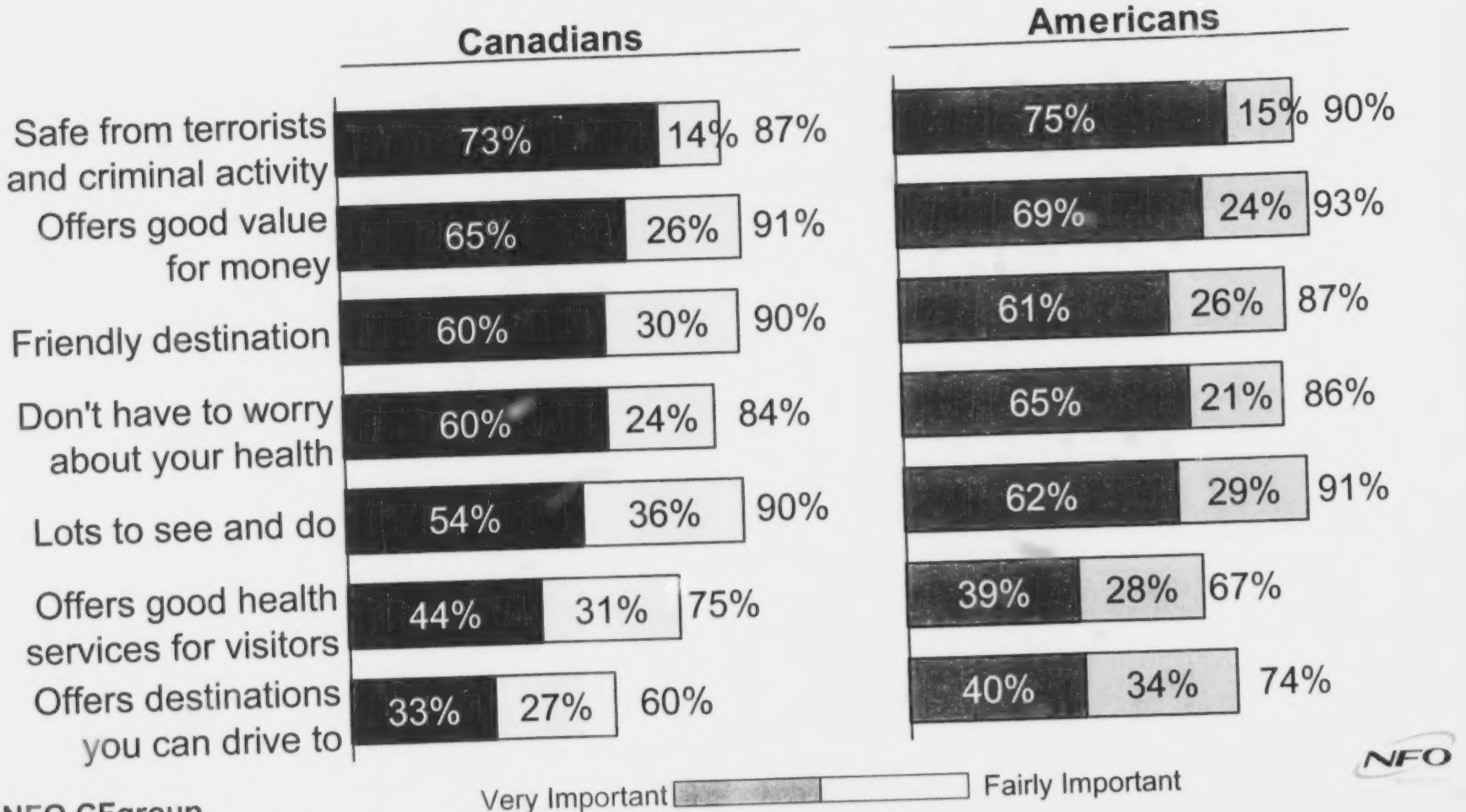
Pleasure Destination Selection Criteria

NFO CFgroup

Importance Of Various Factors In Selecting A Pleasure Travel Destination

Percent of past 2 year/next 12-month travellers



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Overall Assessment Of Toronto As Travel Destination

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Overall Assessment Of Toronto As A Travel Destination

By Region In Canada

			Among Travellers In Each Case Average Overall Rating As Pleasure Travel Destination*
Place Of Residence:			
Quebec City	(155)	#	6.9
Montreal	(206)	#	6.4
Ottawa	(204)	#	7.4
Toronto	(337)	#	8.2
Other Ontario	(414)	#	7.6
Winnipeg	(206)	#	6.5
TOTAL CANADA	**(1,522)**	#	**7.5**

* On 10-point scale.

Overall Assessment Of Toronto As A Travel Destination

By US Market

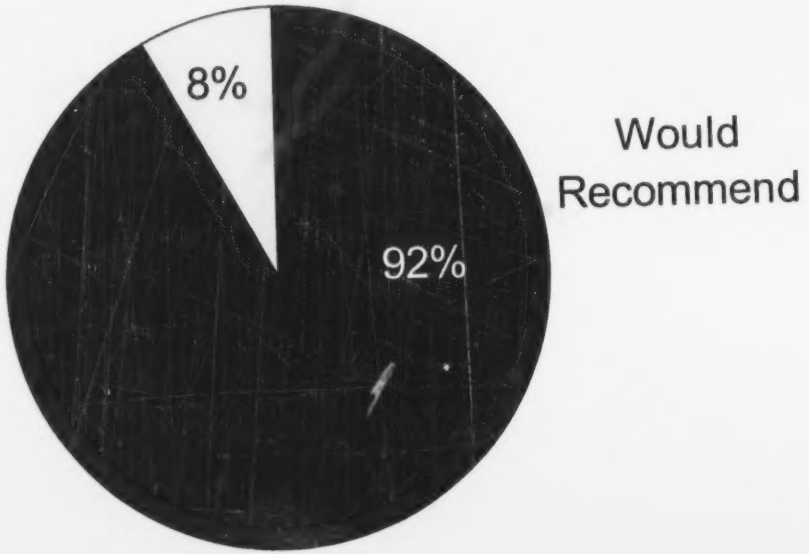
		Percent Aware Of Toronto[1]		Average Overall Rating* As Pleasure Travel Destination[2]
Buffalo	%	98	#	8.2
Rochester	%	98	#	8.2
Syracuse	%	98	#	8.2
New York City	%	88	#	7.0
Pittsburgh	%	98	#	7.8
Detroit	%	98	#	8.3
Cleveland	%	99	#	8.0
Boston	%	98	#	7.4
Columbus	%	97	#	6.8
Washington DC	%	98	#	6.9
Cincinnati	%	97	#	6.7
Milwaukee	%	94	#	7.4
Indianapolis	%	97	#	6.9
Chicago	%	94	#	7.3
Philadelphia	%	95	#	7.2
Minneapolis	%	98	#	6.9
TOTAL US	**%**	**97**	#	**7.3**

[1] Among total adults. [2] Among travellers aware of Toronto * On 10-point scale

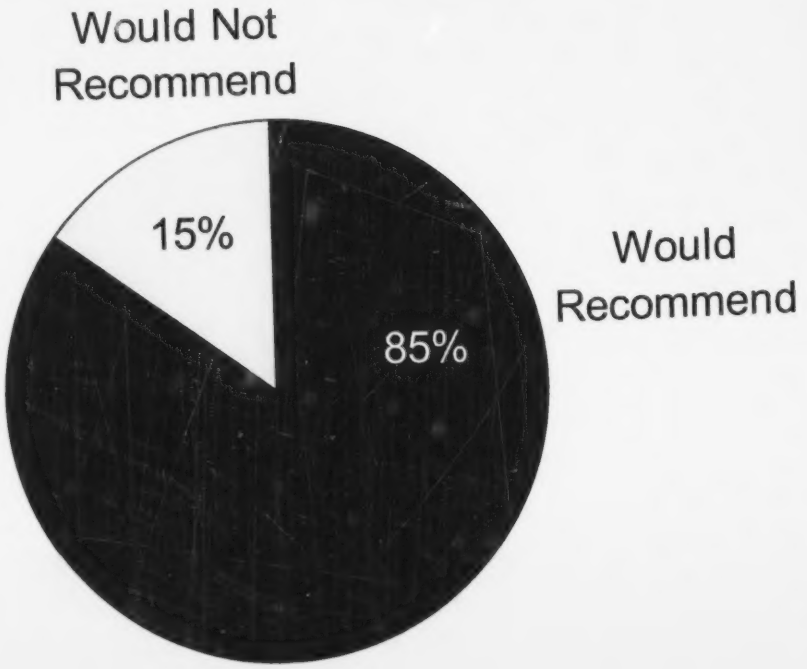
Recommendation Of Toronto For "Big City Experience"

Among those who have ever visited Toronto

Canadians



Americans



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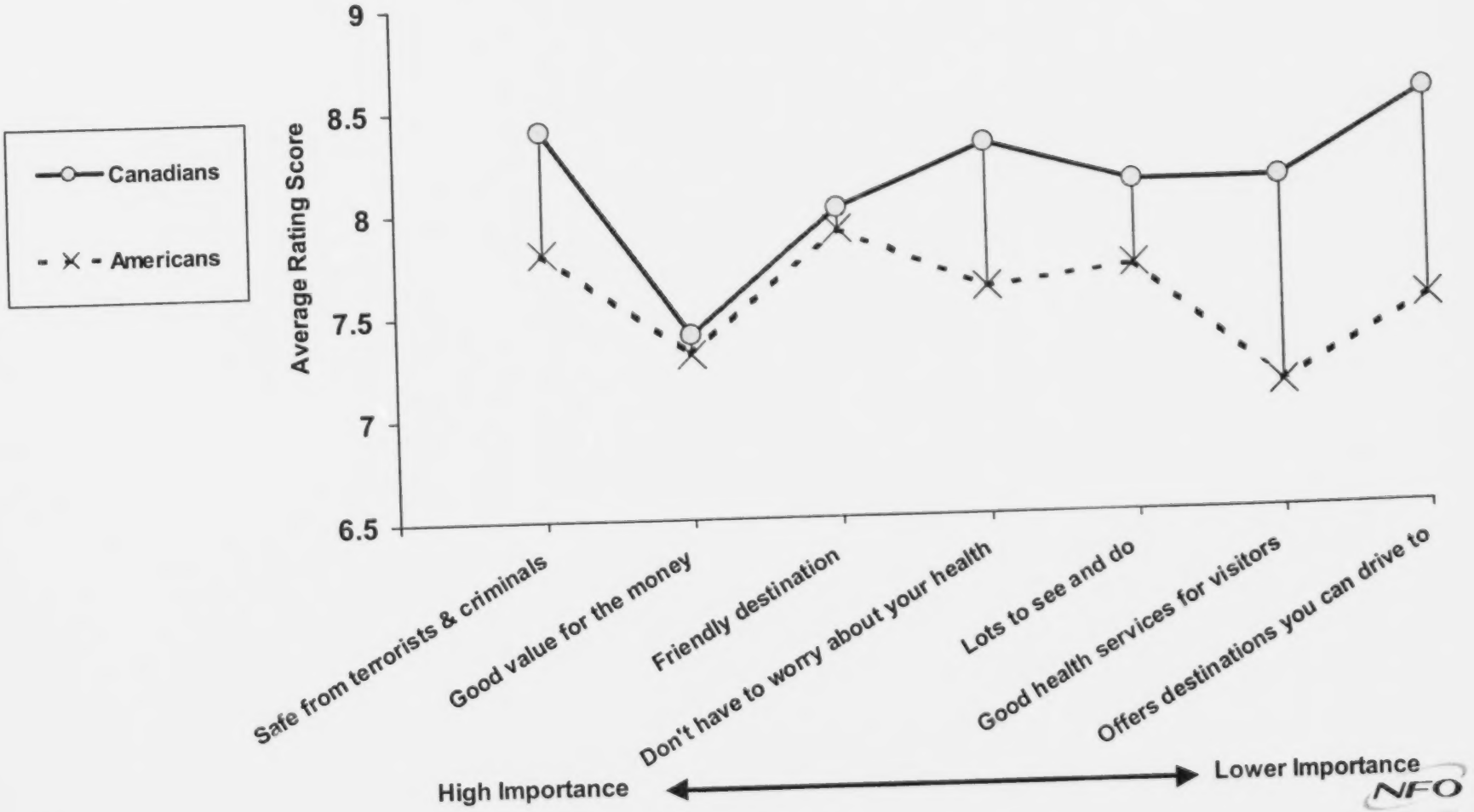
Perceptions Of Ontario

Image

NFO CFgroup

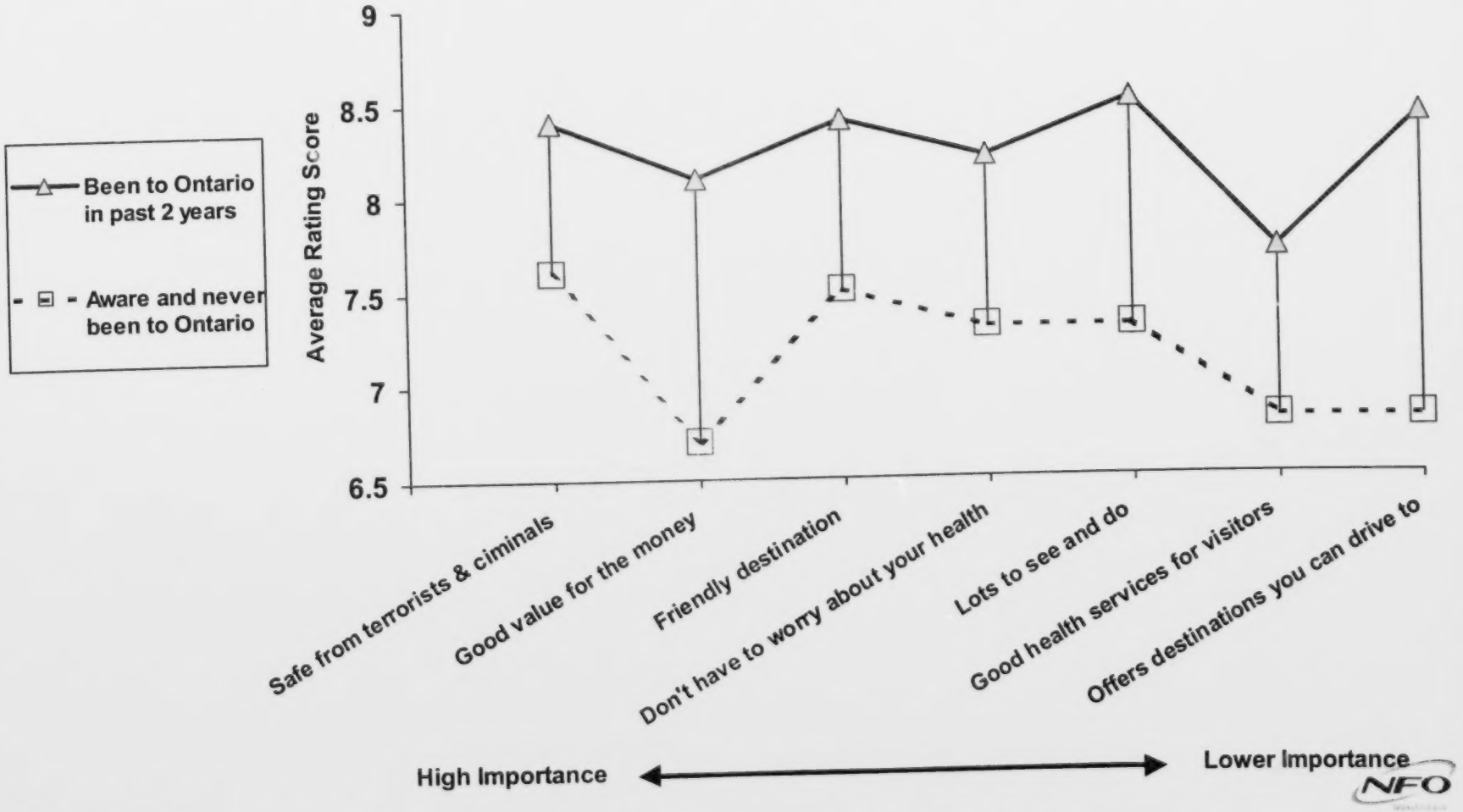
Rating Ontario For Specific Attributes

Average on 10-point scale among travellers aware of Ontario



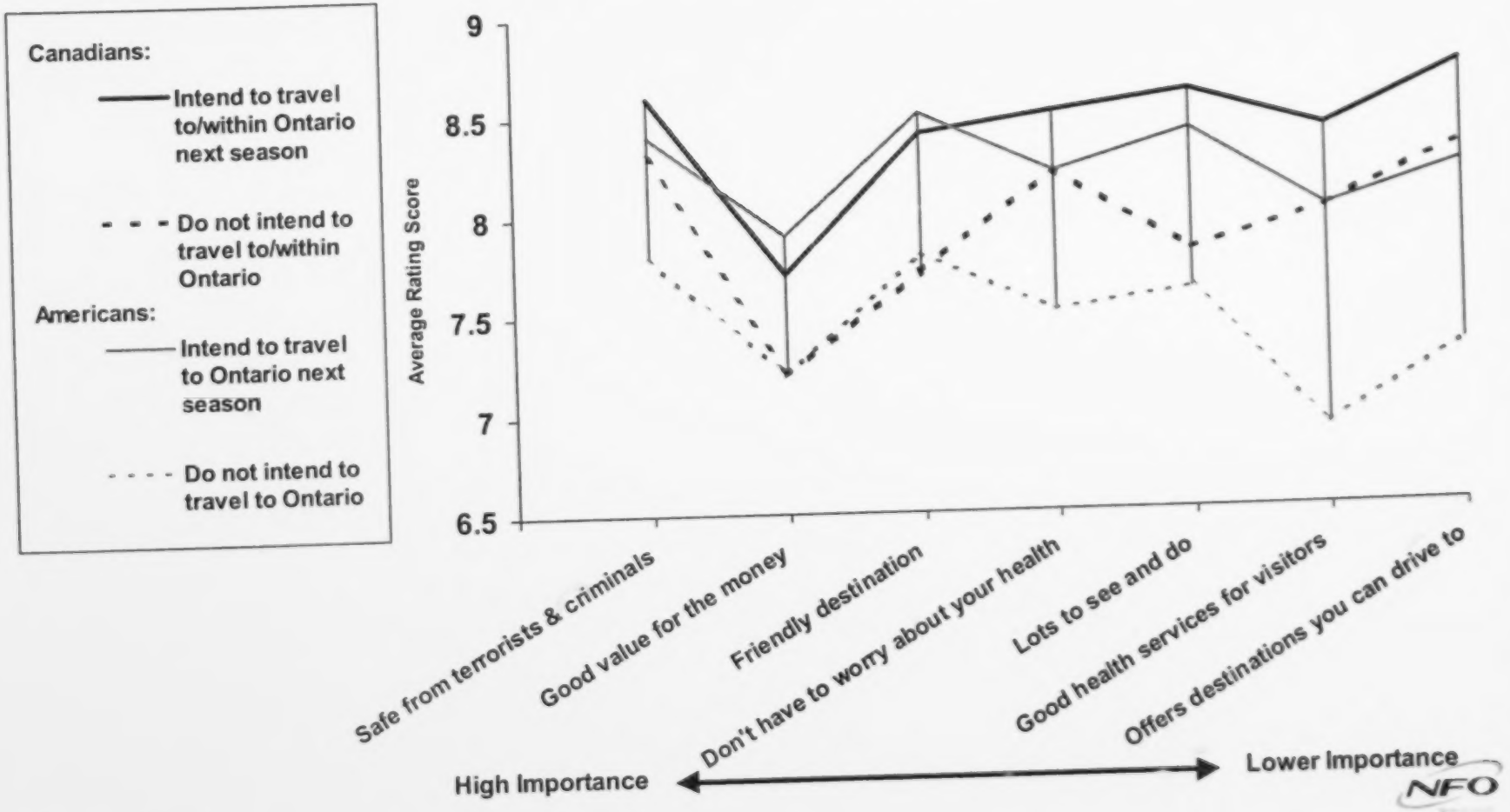
Rating Ontario For Specific Attributes By Experience With The Province

Average on 10-point scale among **American** travellers



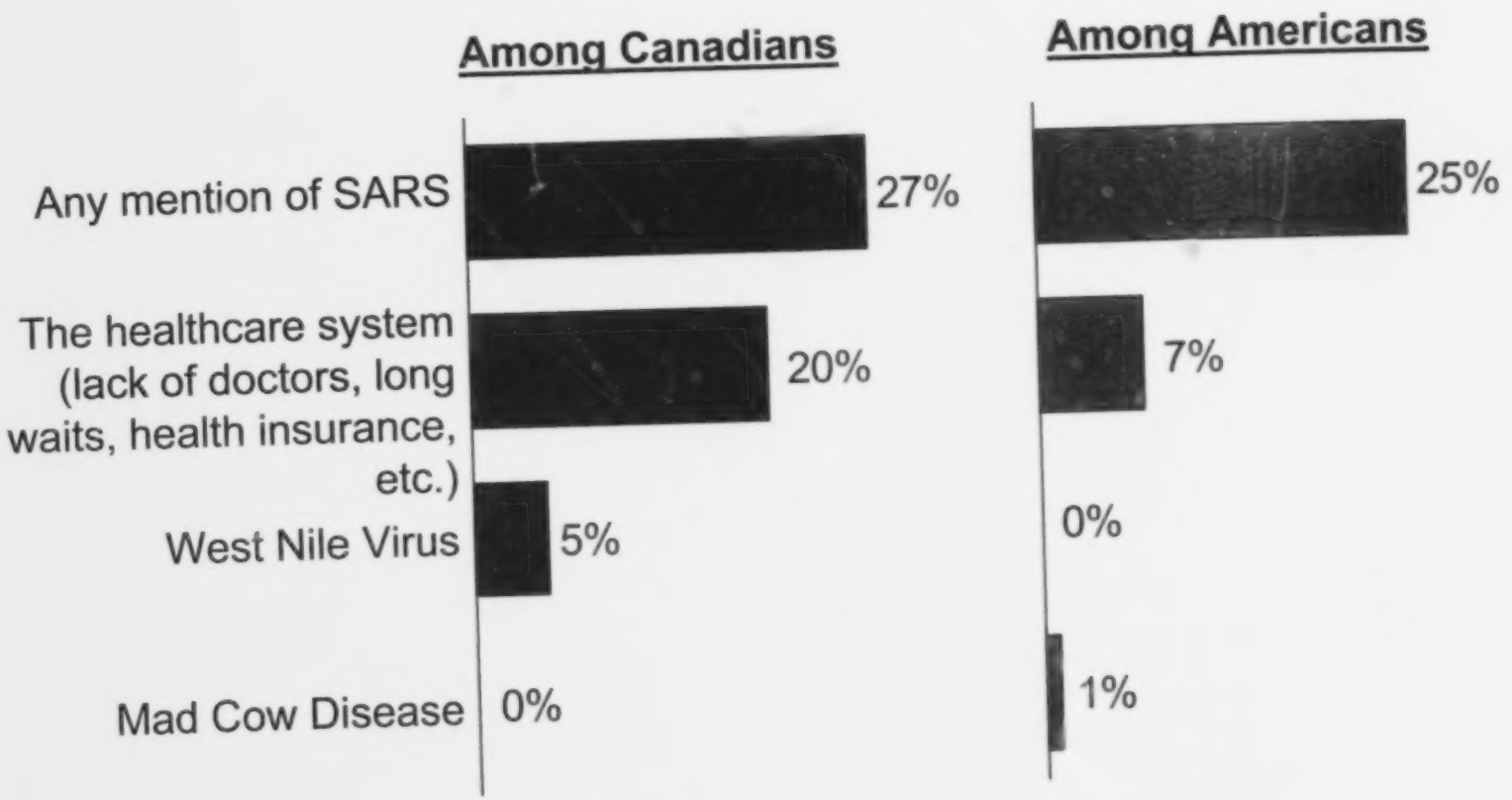
Rating Ontario For Specific Attributes By Travel Intention (Dec/Feb)

Average on 10-point scale among travellers



Volunteered Health Issues Associated With Ontario

Percent of those who rate Ontario 7 or lower as a destination where you don't have to worry about your health



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Perceptions Of Ontario

As Destination For Specific Trip Types

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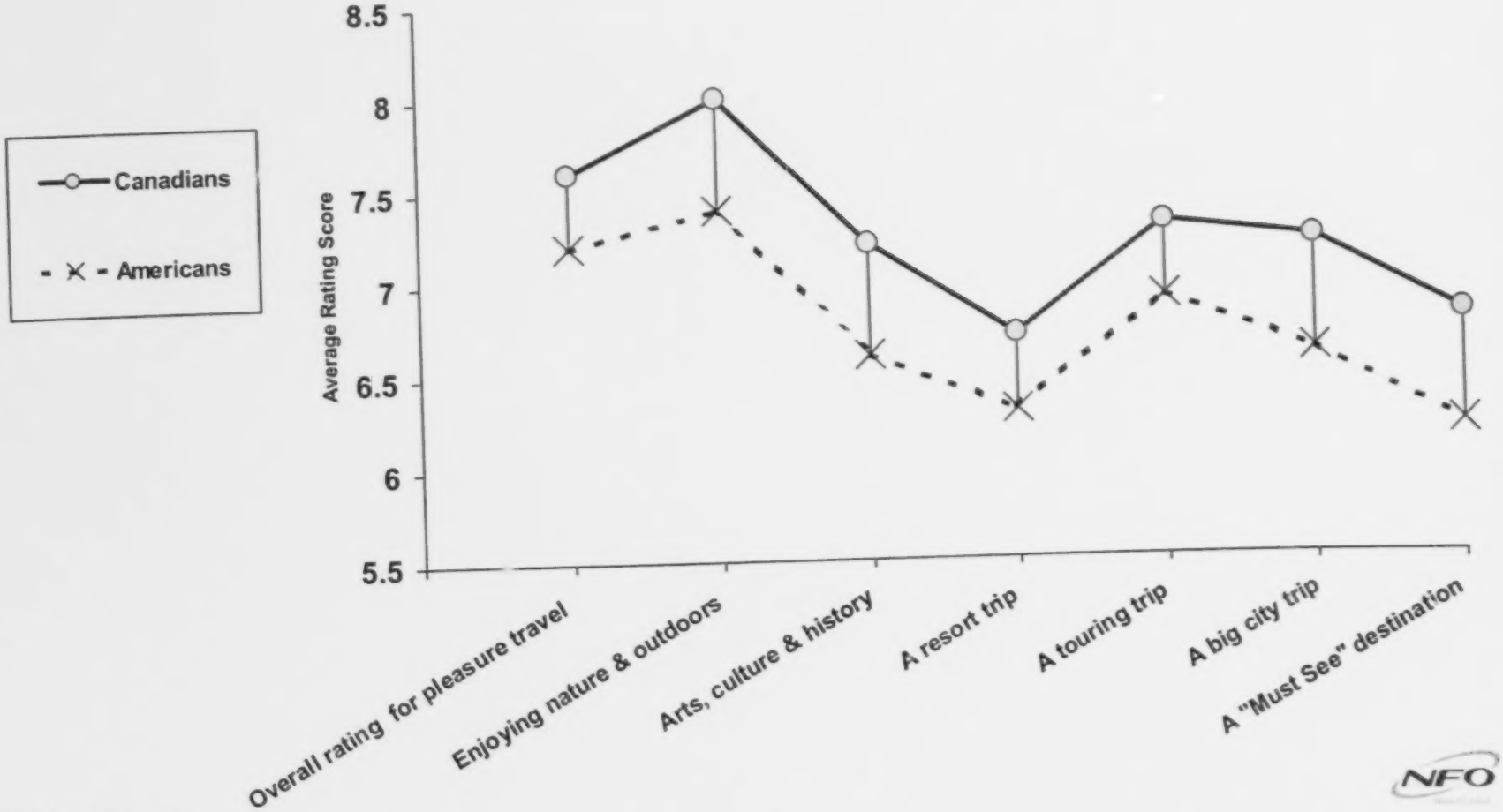
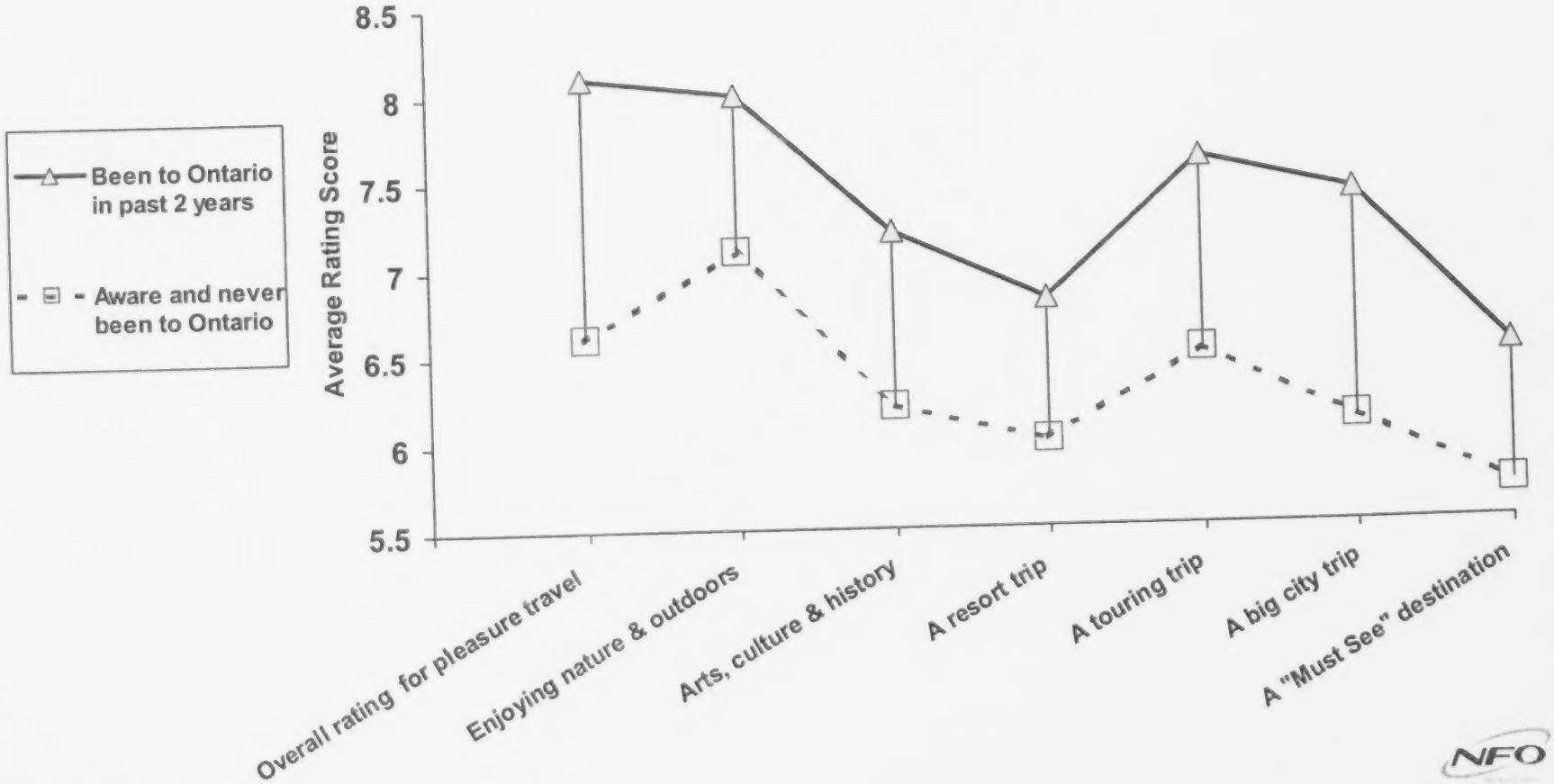
Rating Ontario As Destination For Specific Trip Types

Average on 10-point scale among travellers aware of Ontario



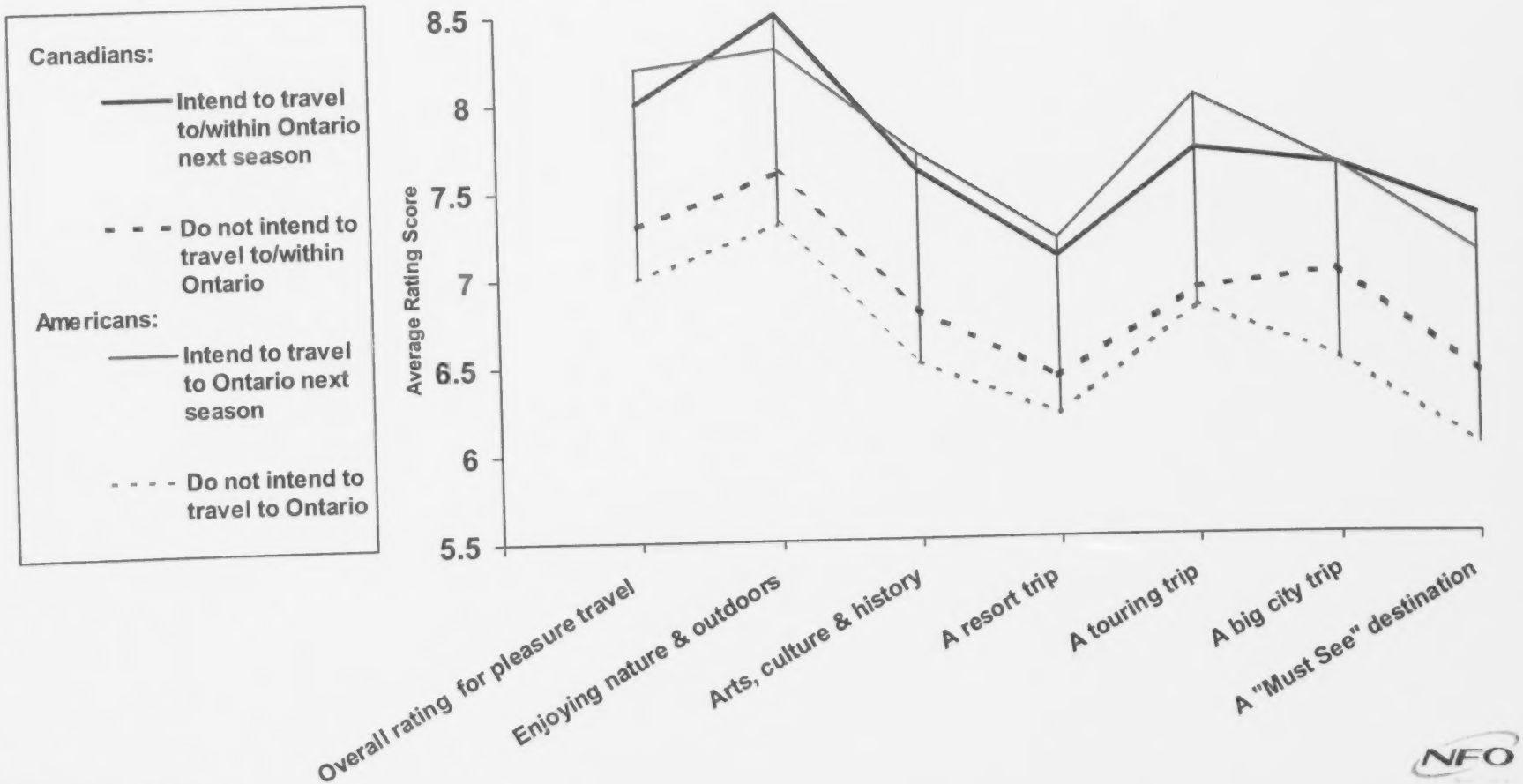
Rating Ontario As Destination For Specific Trip Types By Experience With The Province

Average on 10-point scale among **American** travellers



Rating Ontario For Specific Trip Types By Travel Intention (Dec/Feb)

Average on 10-point scale among travellers



Perceptions Of Toronto

As Destination For Specific Trip Types

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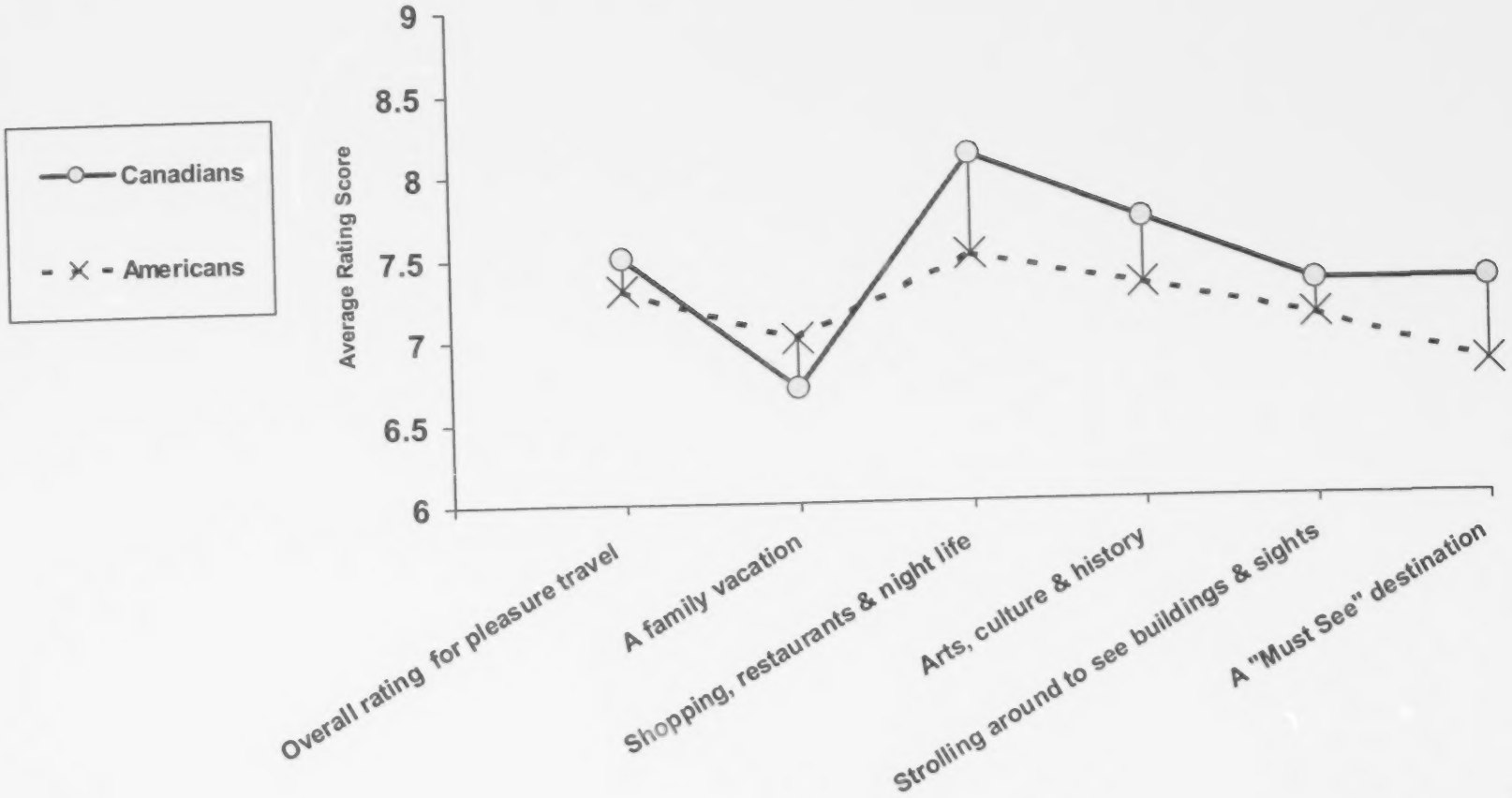
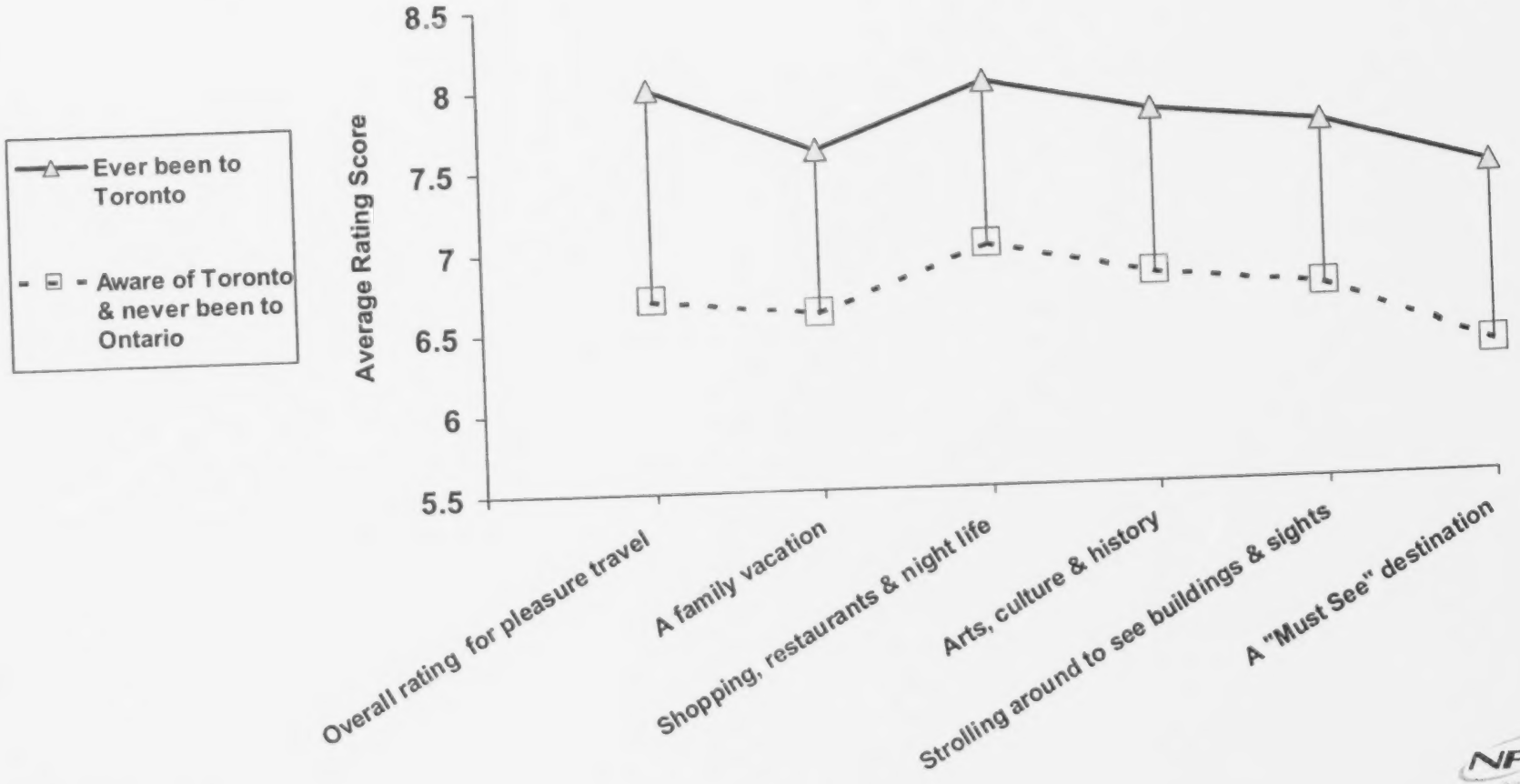
Rating Toronto As Destination For Specific Trip Types

Average on 10-point scale among travellers aware of Toronto



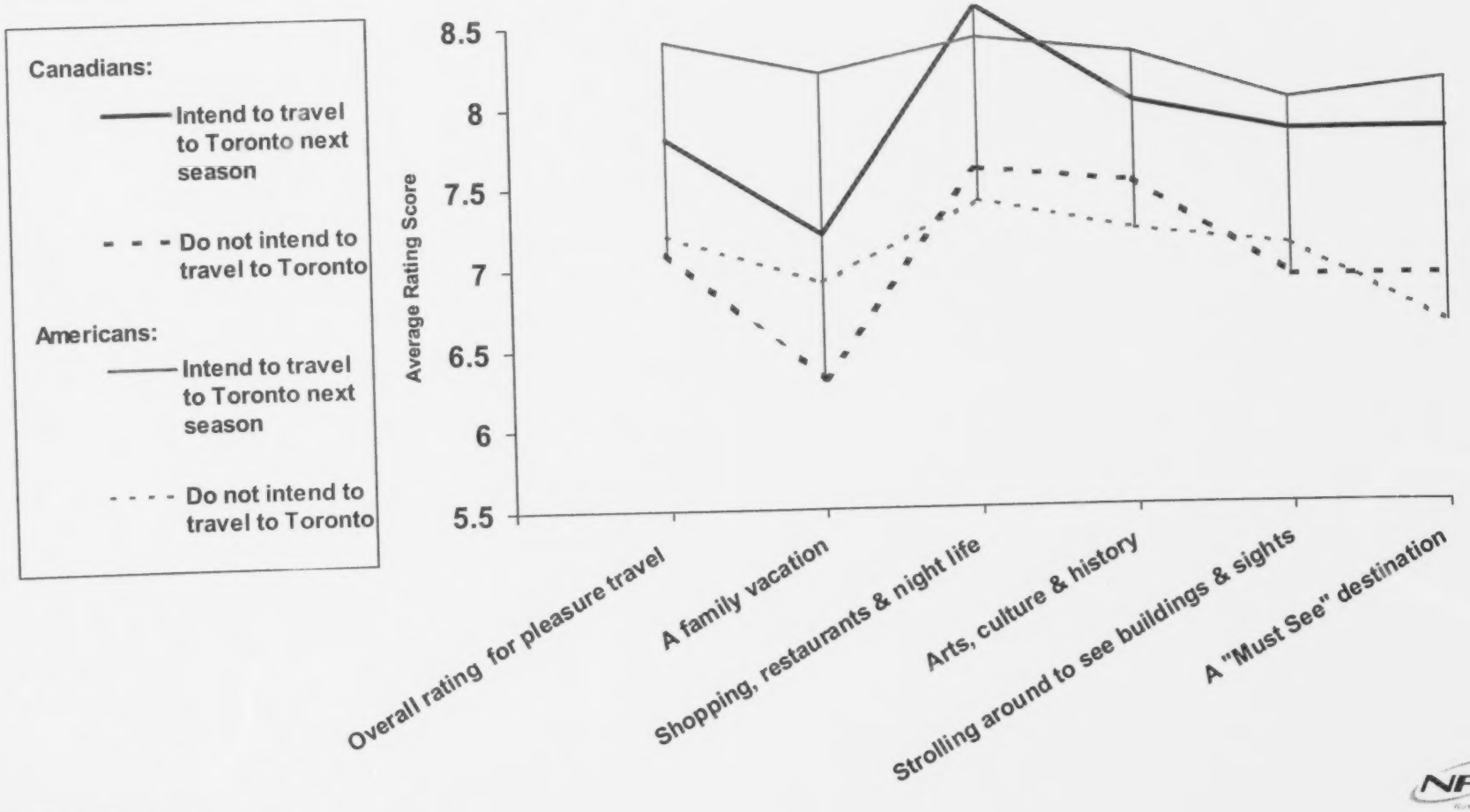
Rating Toronto As Destination For Specific Trip Types By Experience With The City

Average on 10-point scale among **American** travellers



Rating Toronto For Specific Trip Types By Travel Intention (Dec/Feb)

Average on 10-point scale among travellers



Volunteered Reasons For Visiting Toronto

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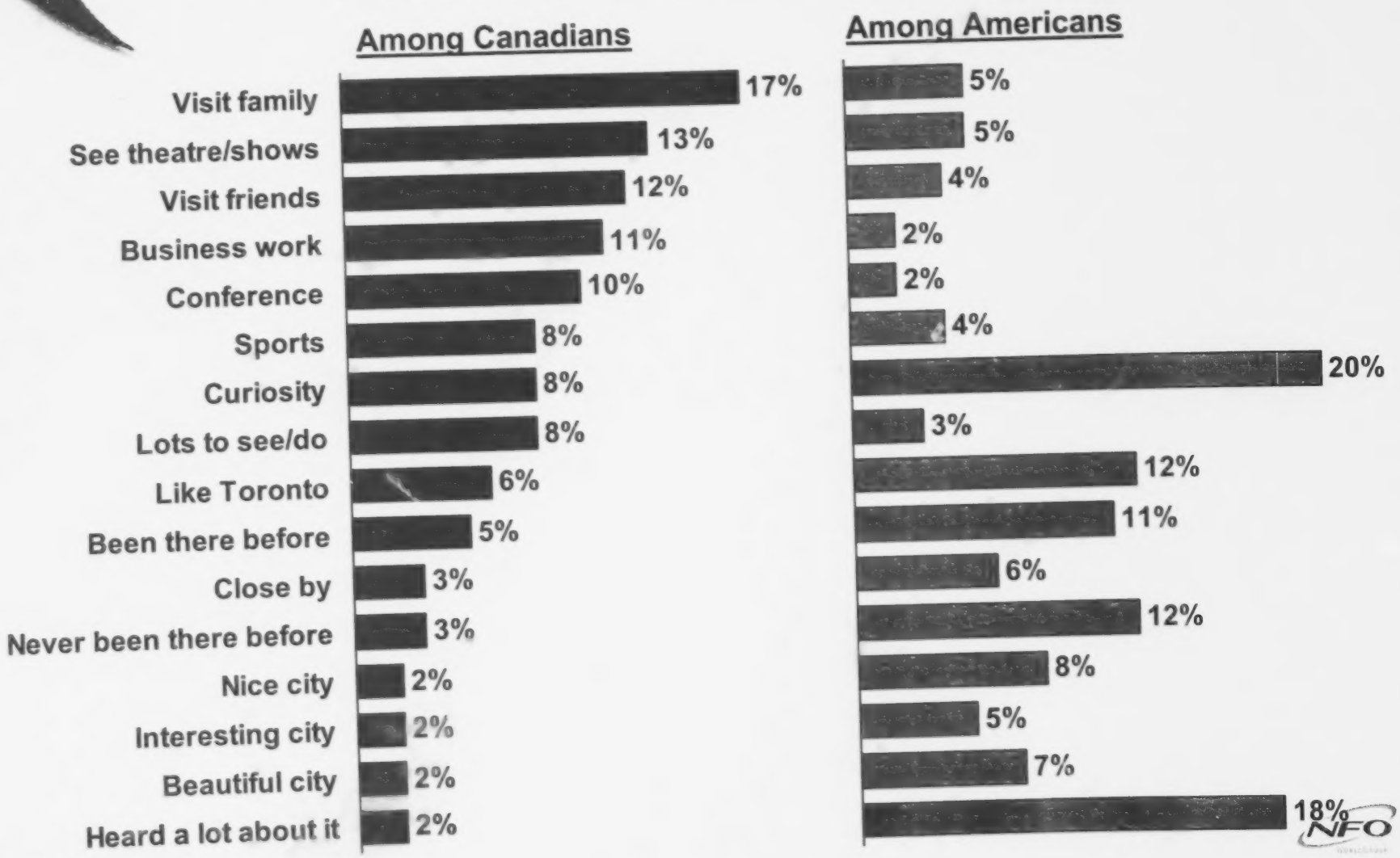
Volunteered Reasons For Possibly Visiting Toronto

Percent of Non-Toronto residents aware of the city



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Volunteered Reasons For Visiting Niagara Falls

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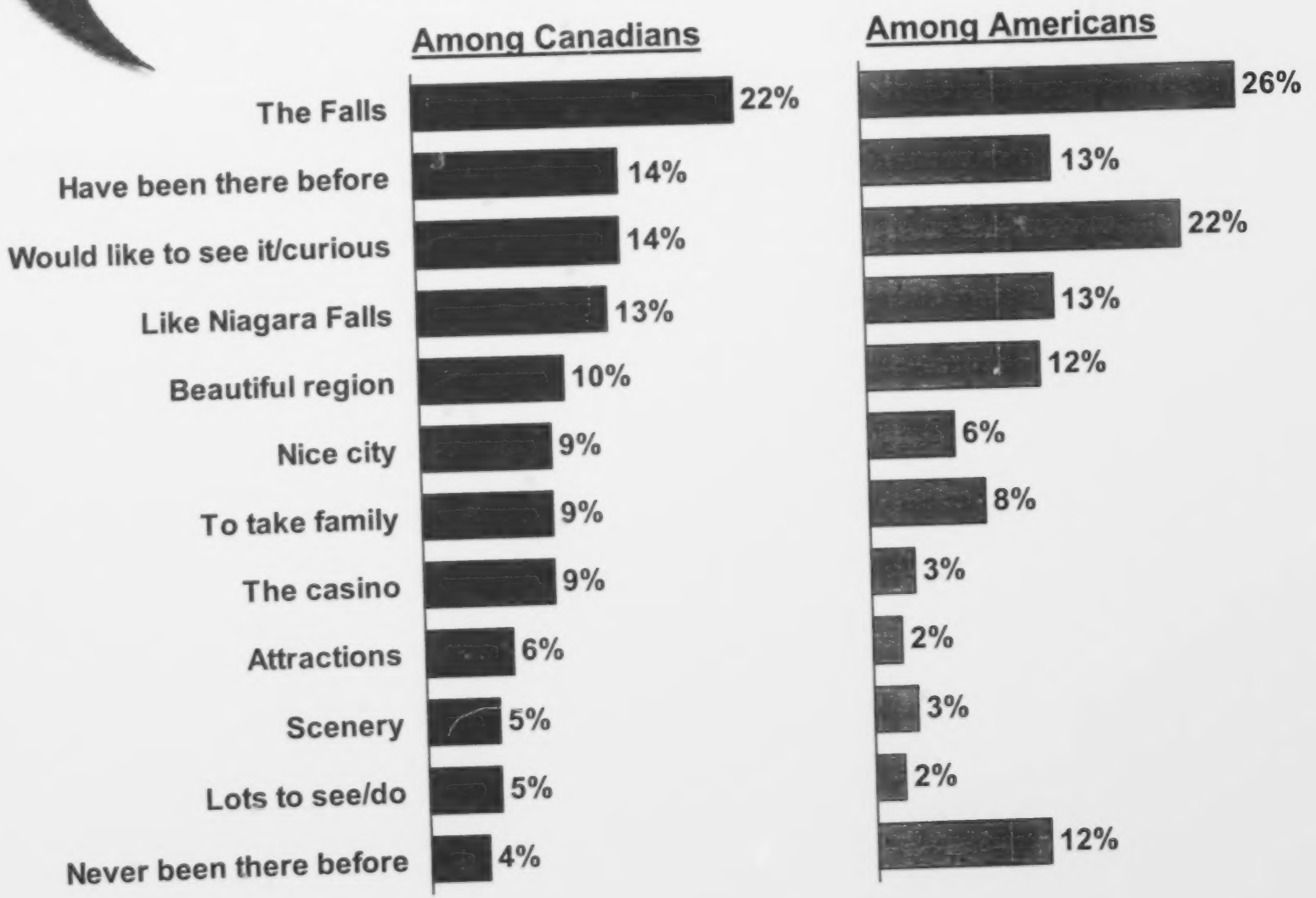
Volunteered Reasons For Possibly Visiting Niagara Falls, Ontario

Percent of Non-Niagara Falls residents expressing an interesting in Visiting



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The Trip Planning Process

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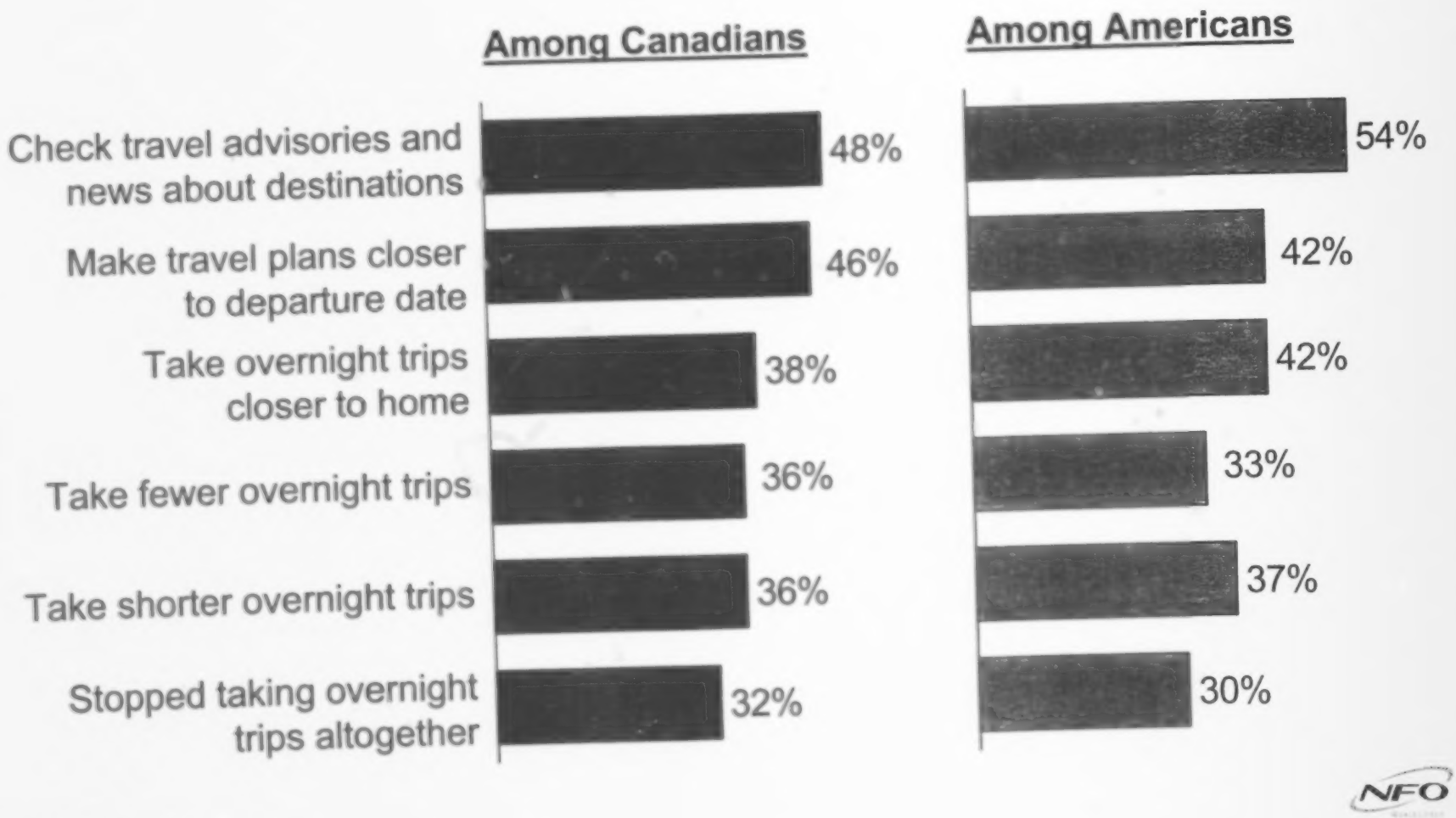
Changes In Travel Behaviour Over Past Two Years

Percent of adults



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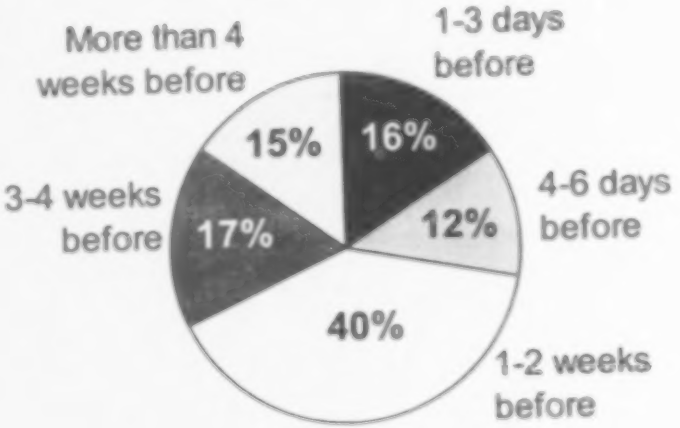
Booking Or Planning Time Frames

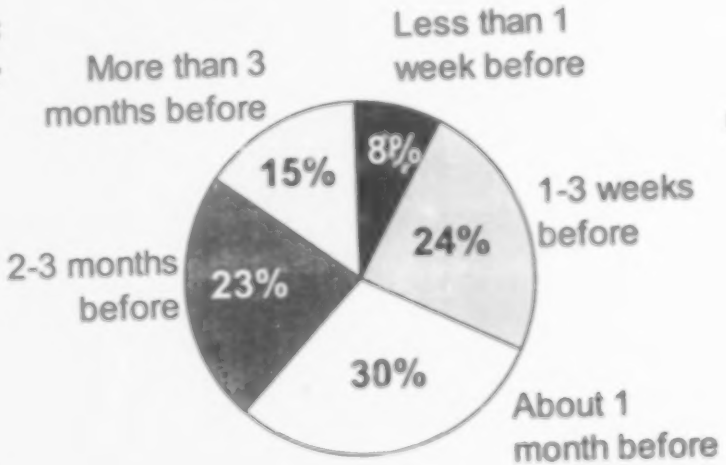
Percent of total travellers

Among Canadians

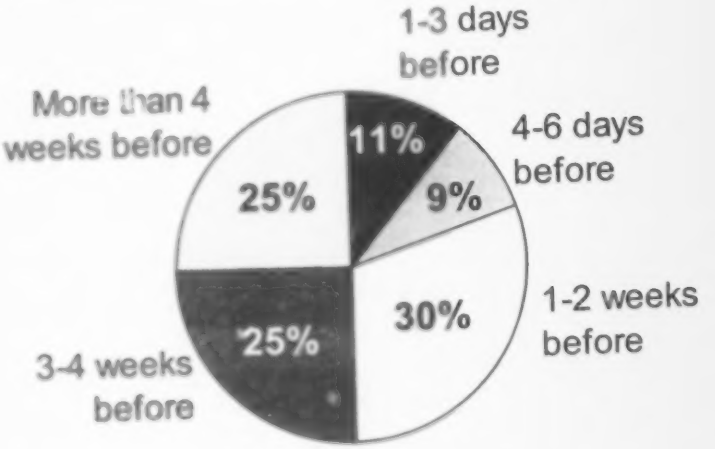
Short Trips (1-3 Nights):

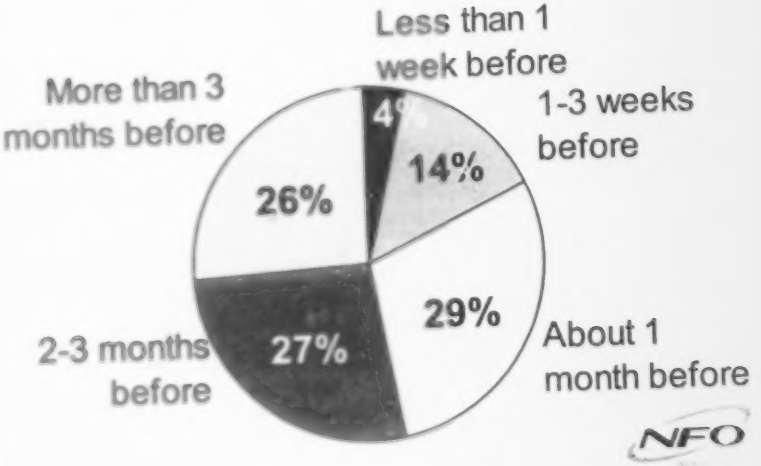


Long Trips (4+ Nights):



Among Americans





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Summary And Implications

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Conclusions and Implications

- Negative events affecting the North American market for travel have achieved widespread awareness in both Canada and the United States.
  - SARS, West Nile and Mad Cow are known to virtually all North Americans.
  - Indeed, on both sides of the border, these events have a somewhat stronger cognitive presence than do the various terrorist alerts that have been issued in the US.
- By implication, these negative events have the potential for significant residual negative impact on travel volumes. Given this backdrop, they can also quickly turn into tourism crises if there is a recurrence, or if similar events receive media attention.

Conclusions and Implications (Cont'd)

- If one considers their impact on Winter 2004 travel volumes, it can certainly be argued that, collectively, these incidents have had a dampening effect on the market well after the immediate crises have passed.
  - More than two million potential North American travellers have cancelled, postponed or otherwise altered travel plans for the coming season because of these events.
  - Ontario stands out as bearing the brunt of the impact within the US source markets, with more than 600,000 Americans reducing their travel to the province (usually by cancelling, postponing or choosing an alternative destination).

Conclusions and Implications (Cont'd)

- Of the specific events specifically measured in the survey, SARS has had, and continues to have, the most impact on travel planning. This is particularly true in the US markets where more than 40% of those who have altered Winter plans in response to these events point specifically to SARS as the main factor.
- There is also strong evidence to suggest that Ontario and, Toronto in particular, have been stigmatized to some degree by the occurrence of SARS.
  - Approximately 600,000 Canadians and more than 4 million Americans are inclined to reduce or eliminate travel to or within Ontario during the coming Winter and Spring seasons because of SARS.

Conclusions and Implications (Cont'd)

- There is a marked geographic skew to these effects, and this has the potential to mask their significance among tourism planners and decision-makers based in Ontario.
  - In Ontario itself, concern about SARS has declined dramatically since its peak.
  - In the external source markets closest to Toronto and Niagara Falls (and reached by Toronto media), SARS has had a very substantial negative impact on travel planning.
  - However, there are clear indications that these effects will dissipate quite dramatically in 2004, with travellers in markets such as Western New York returning to more typical dispositions.

Conclusions and Implications (Cont'd)

- In the more distant source markets, evidence suggests that SARS continues to represent a drag on Ontario travel intentions. In fact, the potential exists for these negative impacts to continue manifesting themselves over an extended time frame.
  - In part, this is likely because knowledge of Toronto and Ontario in these markets is fairly limited. The negative spotlight on the region during 2003 therefore takes on greater significance in the absence of more recent (positive) news.
  - Within this type of environment, specific negativity could transmute into stigma and a more general, and lasting, feeling of unease about the region.

Conclusions and Implications (Cont'd)

- This situation takes on particular significance when considering large source markets that, in absolute terms, have the potential to generate large overnight tourism volumes for Ontario. This would include markets such as Detroit, New York City and to a somewhat lesser degree, Philadelphia, Pittsburgh, Chicago, Boston and Montreal.

- It should be emphasized that negative events, and SARS in particular, are not necessarily top-of-mind among potential travellers in these markets. Instead, the aura of negativity associated with these events is more likely to express itself as general lack of interest, low appeal and an inclination to consider alternative travel destinations first. All else being equal, the perceptual effects of such events, even if seeing expression on a sub-conscious level, might just be enough to push potential travellers elsewhere for an extended period.

Conclusions and Implications (Cont'd)

- What are the marketing implications of this?
- There exists considerable potential demand for travel to Ontario generally and to Toronto and Niagara Falls specifically.
  - One has to look only to the very large pool of Americans who have made a pleasure trip to Ontario at some point in the past.
- The "low hanging fruit" from a marketing perspective might be defined as the population of Americans in the near and mid markets who have visited Niagara Falls/Toronto/Ontario in the past, but have not done so recently.
  - They already have relatively positive impressions of the region.
  - There may be a need to simply rekindle enthusiasm for visiting again within this segment.

Conclusions and Implications (Cont'd)

- At some point, though, one must go beyond "preaching to the converted" if true growth momentum is to be established.
- With respect to geographic targeting, it would seem that a communications initiative targeting markets capable of delivering large tourism volumes and manifesting lingering resistance should be considered to support Ontario over the Winter season and, perhaps more importantly, during the following Spring shoulder season.
- Perceptual data suggest a number of communication focal points.
  - Given that Toronto and Niagara Falls are the primary destinations for pleasure trips to Ontario, one could argue that the province's image toward nature and the outdoors to an inordinate degree.

Conclusions and Implications (Cont'd)

- One could also argue that the emphasis should be placed on generating excitement and enthusiasm for Ontario and its specific destinations. Particularly in the US, the approach should involve tapping in to emotions and underlying curiosity about the region and city.
- It seems reasonable, then, to demonstrate the variety of product and the fact that the region is vibrant, dynamic and quite capable of delivering new tourism experiences to repeat visitors.
- Toronto should possibly receive special attention, not only because it has been most affected by SARS, but also because it maintains a fairly weak image profile for a major urban tourism destination. The Toronto product's breadth, diversity and distinctiveness are not adequately appreciated.

Conclusions and Implications (Cont'd)

- In the case of Niagara Falls, the Falls itself remains the anchor of the region's appeal, but there may be some value to marrying this with the variety of experiences, both new and traditional, offered throughout the broader Niagara region.
- This approach may be particularly useful from the perspective of drawing more travellers from larger, more distant markets in the catchment area. Arguably, Niagara Falls currently draws insufficiently from these source markets and is perhaps too reliant on localized repeat visitors.

Conclusions and Implications (Cont'd)

- All of this implies dealing with the impact of issues such as SARS in an indirect way by reinforcing or re-establishing a positive brand positioning for the Province.
- After all, fundamentally the issue is not really SARS per se, but rather the more nebulous disenchantment with the region that events like this have engendered.
- Finally, it should be underlined that this recommendation DOES NOT imply abandoning support in near markets such as Buffalo and Rochester.
  - These markets historically deliver better conversion rates and are significant sources of same-day travellers.

Conclusions and Implications (Cont'd)

- Instead, a dual strategy may be required - one for recovering markets and one for those that are less in tune with Toronto/Ontario and more likely to harbour lingering negative effects.
- As well, one should entertain the possibility of incorporating promotional initiatives that recognize the collapsing trip planning schedule and the role that packaged value-added promotional offers can play in terms of stimulating interest in Ontario travel and reinforcing value perceptions.

Appendix

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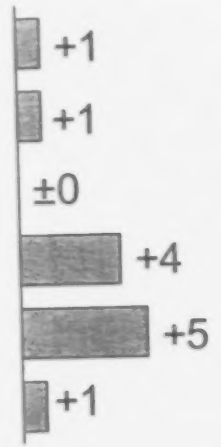
Canadian Geographic Variation In SARS
Longer Term Impact On Ontario

		Percent Of Adult Residents In Each Case Stating... Because Of SARS		
		Have Cancelled Or Reduced Travel To Ontario	Less Likely To Travel To Ontario Between Now & May	Recovery Index
Quebec City	(197) %	10	9	+1
Montreal	(280) %	9	8	+1
Ottawa	(249) %	8	8	±0
Toronto	(434) %	7	3	+4
Other Ontario	(514) %	9	4	+5
Winnipeg	(249) %	6	5	+1



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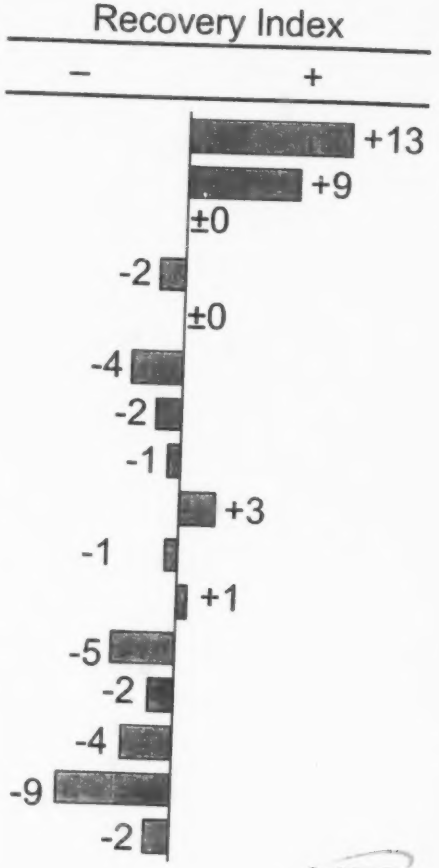
U.S. Geographic Variation In SARS Longer Term Impact On Ontario

		Percent Of Adult Residents In Each Case Stating… Because Of SARS	
		Have Cancelled Or Reduced Travel To Ontario	Less Likely To Travel To Ontario Between Now & May
Buffalo	(293) %	21	8
Rochester	(305) %	16	7
Syracuse	(205) %	9	9
New York City	(164) %	7	9
Pittsburgh	(242) %	7	7
Detroit	(223) %	7	11
Cleveland	(185) %	6	8
Boston	(129) %	5	6
Columbus	(81) %	4	1
Washington DC	(73) %	4	5
Cincinnati	(89) %	3	2
Milwaukee	(175) %	3	8
Indianapolis	(81) %	3	5
Chicago	(198) %	2	6
Philadelphia	(116) %	2	11
Minneapolis	(165) %	*	2



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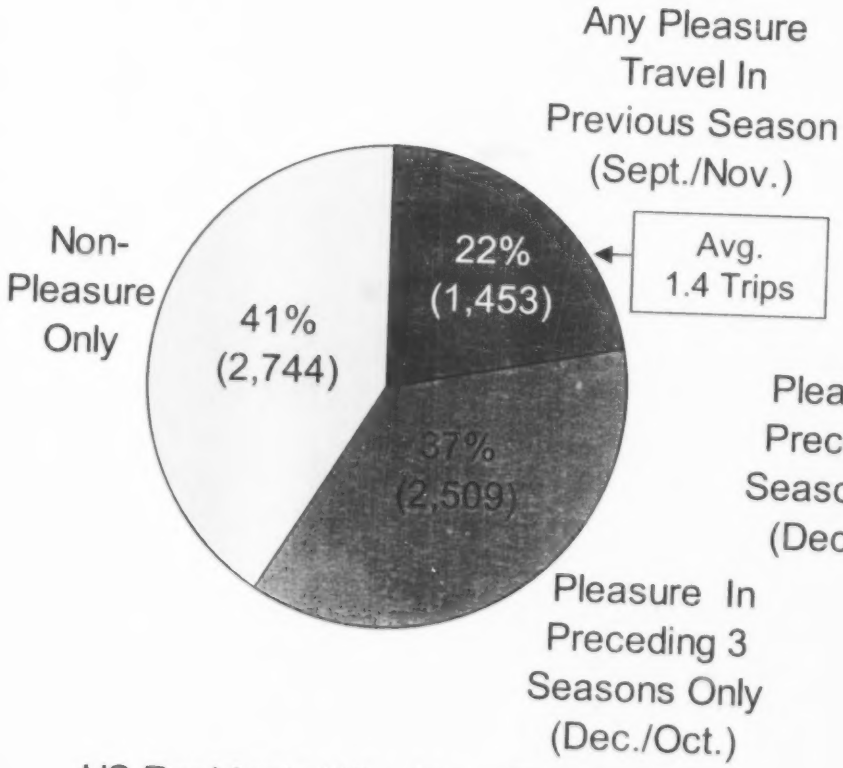
*Less than 0.5%.

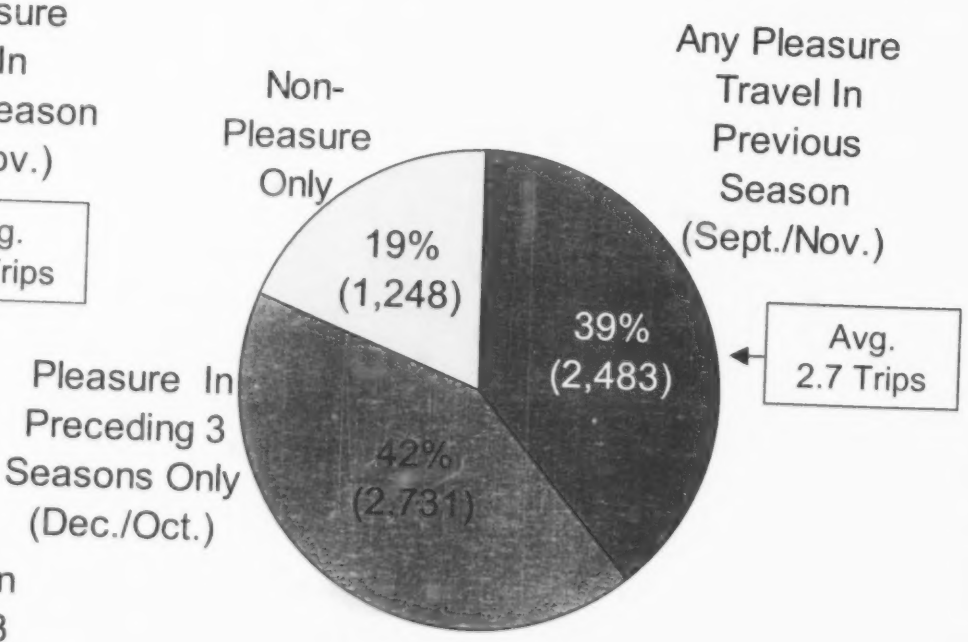
Pleasure Travel To/Within Ontario

Ontario Travel Among Americans



US Residents Who Have Taken Trip To Ontario In Past 12 Months

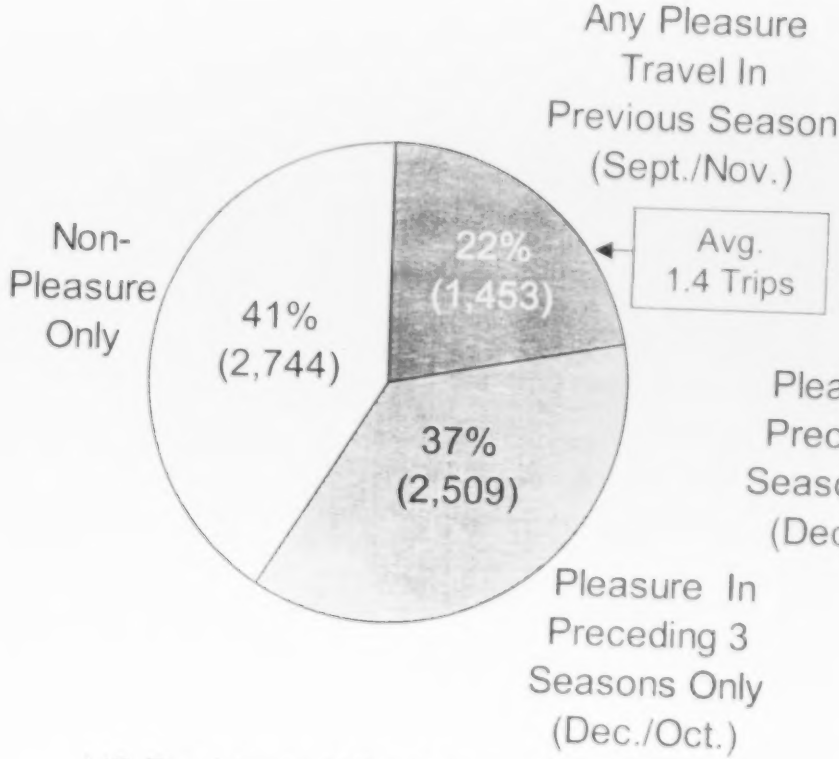
Ontario Travel Among Canadians



Canadian Residents Who Have Taken Trip To/Within Ontario In Past 12 Months

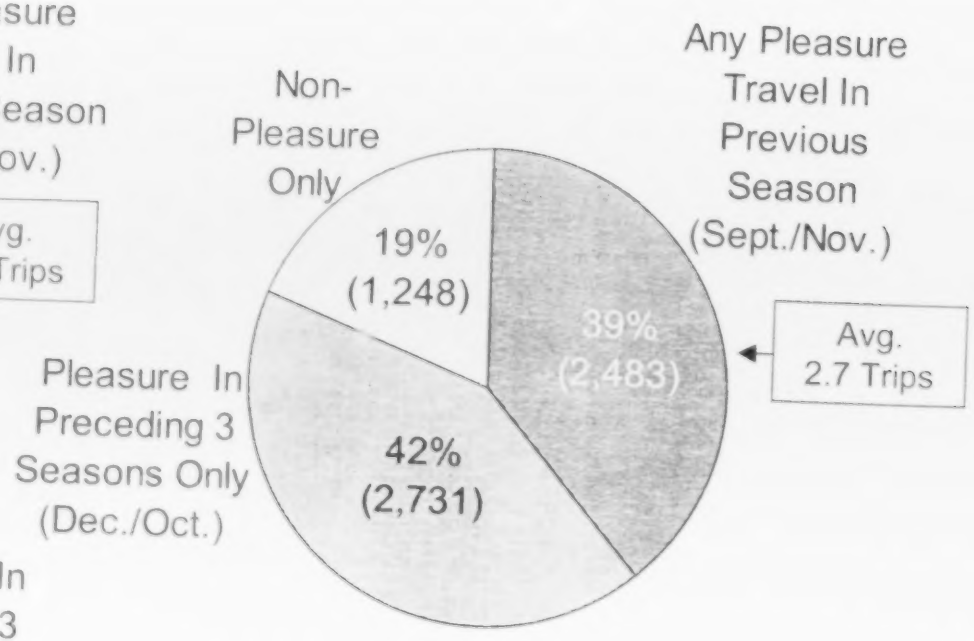
Pleasure Travel To/Within Ontario

Ontario Travel Among Americans



US Residents Who Have Taken Trip To Ontario In Past 12 Months

Ontario Travel Among Canadians



Canadian Residents Who Have Taken Trip To/Within Ontario In Past 12 Months

Travel Intentions

Origin Of Intended Trips To Ontario

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Ontario Travel Intention Incidence By Canadian Market

		Percent Of Adults In Each Case Stating...				
		Intend To Travel To/Within Ontario			SARS Will Likely Reduce Ont. Travel Dec/May	
		Dec/Feb	Mar/May	Net Dec/May		
Quebec City	(197) %	12	10	15	9	0.60
Montreal	(280 %	14	16	20	8	0.40
Ottawa	(249) %	33	32	42	8	0.19
Toronto	(434) %	29	27	37	3	0.08
Other Ontario	(514) %	34	35	47	4	0.09
Winnipeg	(249) %	11	15	20	5	0.25
TOTAL CANADA	**(1,923) %**	**26**	**27**	**36**	**5**	**0.14**

SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

Ontario Travel Intention Incidence By US Market

		Percent Of Adults In Each Case Stating				
		Intend To Travel To/Within Ontario			SARS Will Likely Reduce Ont. Travel Dec/May	
		Dec/Feb	Mar/May	Net Dec/May		
Buffalo	(293) %	25	24	34	6	0.18
Rochester	(305) %	22	22	30	6	0.20
Syracuse	(205) %	10	11	17	7	0.41
New York City	(164) %	6	10	12	9	0.75
Pittsburgh	(242) %	8	19	23	6	0.26
Detroit	(223) %	15	22	28	10	0.36
Cleveland	(185) %	6	16	18	8	0.44
Boston	(129) %	2	10	12	6	0.50
Columbus	(81) %	6	7	11	1	0.09
Washington DC	(73) %	2	9	11	4	0.36
Cincinnati	(89) %	2	3	5	2	0.40
Milwaukee	(175) %	3	5	6	8	1.33
Indianapolis	(81) %	2	2	2	4	2.00
Chicago	(198) %	3	5	5	5	1.00
Philadelphia	(116) %	5	9	11	10	0.91
Minneapolis	(165) %	2	4	4	2	0.50
TOTAL US	**(3,381) %**	**6**	**9**	**12**	**7**	**0.58**

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SARS Magnitude Ratio (Reduce/Will Travel Dec-May)

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Overall Assessment Of Ontario

As Travel Destination

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Overall Assessment Of Ontario As A Travel Destination

By Region In Canada

		Average Rating Score* Among Travellers In Each Case	
		Overall Rating As Pleasure Travel Destination	Rating As A "Must See" Destination
Place Of Residence:			
Quebec City	(155) #	6.9	5.6
Montreal	(206) #	6.3	5.3
Ottawa	(204) #	7.9	7.0
Toronto	(337) #	7.8	6.9
Other Ontario	(414) #	8.2	7.6
Winnipeg	(206) #	7.1	6.1
TOTAL CANADA	**(1,522) #**	**7.6**	**6.8**

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* On 10-point scale.

Overall Assessment Of Ontario As A Travel Destination

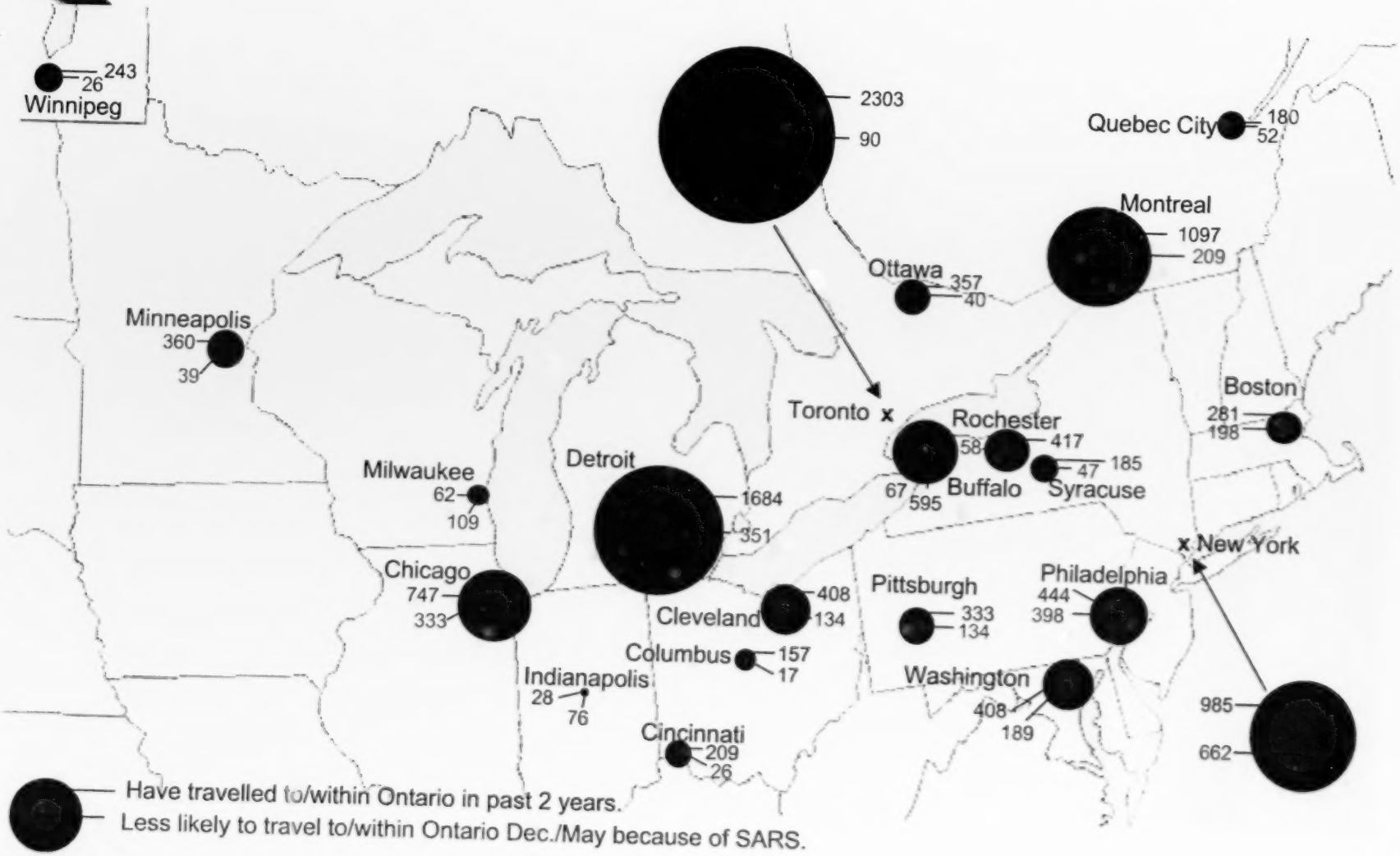
By US Market

		Percent Aware Of Ontario[1]		Average Rating Score[2] Overall As Pleasure Travel Destination	Average Rating Score[2] As "Must See" Destination
Buffalo	%	98	#	8.0	7.0
Rochester	%	98	#	8.0	6.6
Syracuse	%	98	#	7.7	6.8
New York City	%	88	#	6.8	5.9
Pittsburgh	%	98	#	7.6	6.8
Detroit	%	98	#	7.9	5.9
Cleveland	%	99	#	7.7	6.8
Boston	%	98	#	6.9	5.9
Columbus	%	97	#	6.3	5.5
Washington DC	%	98	#	7.0	5.5
Cincinnati	%	97	#	6.5	6.0
Milwaukee	%	94	#	6.9	6.0
Indianapolis	%	97	#	6.5	5.7
Chicago	%	94	#	7.1	5.9
Philadelphia	%	95	#	7.1	6.3
Minneapolis	%	98	#	7.0	5.9
TOTAL US	**%**	**97**	**#**	**7.2**	**6.2**

[1] Among total adults.

[2] On 10-point scale among travellers aware of Ontario

Ontario Travellers In Past Two Years (Thousands)



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